

Management and Technical Assistance Publication Series No. 1

Storytelling For Managers or How To Use Information To Make Your Case - Current Practices

by Positive Outcomes™
Eleanor Hunnemann and Frederick Richmond, Partners

A good story requires the distinction between data and information. Data cannot by itself convey a message. Data are dumb! In the hands of a good storyteller, analysis, presentation and marketing can turn data into information that conveys the story you want to tell.

In The Beginning

The Community Services Block Grant of 1981 designated Community Action Agencies (CAAs) to be the recipients of Community Service Block Grant (CSBG) funds. Agencies use these funds to develop, coordinate, and implement programs and services that enable low-income people to become more self-sufficient. Since 1965, the determination of CAAs has remained steadfast: to improve the conditions in which low-income Americans live and to increase their stake in their communities.

How well have we told our story? How well have we done? Existing management reporting systems have counted and measured the amount of service and the number of clients. But without the ability to link a client to a specific service or a designated outcome, these systems are primarily meeting external compliance and monitoring needs, rather than a manager's internal needs.

A management information system (MIS) is designed by managers and can be manual or automated. Data collected by the MIS fit into the strategic mission of the organization and meet the internal needs of management. Individual pieces of data are the building blocks of information used to tell your story.

Although used synonymously, an MIS is not the same as a management reporting system. An MIS supports the strategic mission of management and contains the information needed to carry out that mission. Management reporting systems, however, frequently meet the needs of external organizations, not the needs of management. All too often, management reporting systems have been built on the premise that "data speak to me." Fundamentals of these systems include:

The Management and Technical Assistance Publication Series is supported by a grant from the Pennsylvania Department of Community and Economic Development, Bureau of Community Empowerment. Permission is granted to use this article with the following citation: Hunnemann, E.W., and Richmond, F.K., *Storytelling For Managers or How To Use Information To Make Your Case - Current Practices*. Community Action Association of Pennsylvania Management and Technical Assistance Publication Series Number 1, Harrisburg, PA: © Community Action Association of Pennsylvania, 1996.

identifying “all” the data that could be collected, “is interesting,” “might be needed in the future,” or “meets” the needs of the funder. We need to realize that a collection of data is just a collection of data. Our job is to interpret and array the data in a powerful way that speaks to others.

For many years, Community Action Agencies have diligently reported aggregate “raw” data such as numbers of unduplicated clients, basic demographics, services offered and expenditures. These categories are mutually exclusive, so that data from one category cannot be integrated with data from another. For example, an agency using this management reporting system could not differentiate a group of clients by age, race/ethnicity, family status, and income for any operating program or service offered. More than one CAA has wondered what the value of this data is or why it has been collected at all.

The Greatest Story Never Told

Since the passage of Title II of the Economic Opportunity Act of 1964, Community Action Agencies and their predecessor agencies have had the mission to assist low-income people to improve their lives and the communities in which they live. For nearly 32 years, CAAs have proudly delivered their programs and services. We have rarely taken credit for our accomplishments and have not effectively told our story in a manner understood by the public. We are, therefore, in the position of defending our effectiveness because we have lacked the tools to demonstrate the positive impact our programs and services have had in our communities.

Expectations

The present environment demands that human service agencies demonstrate impact. Future funding of all human services agencies will be linked to performance: how well did the client benefited from the program or service? CAAs in particular will be asked to demonstrate how their programs and services improve the self-sufficiency of their clients. Agencies that can demonstrate this measure of effectiveness will be rewarded with continued funding.

Existing management reporting systems contain data to measure inputs as surrogates for efficiency: counts of clients, units of service and expenditure data. These systems will need to

The Management and Technical Assistance Publication Series is supported by a grant from the Pennsylvania Department of Community and Economic Development, Bureau of Community Empowerment. Permission is granted to use this article with the following citation: Hunnemann, E.W., and Richmond, F.K., *Storytelling For Managers or How To Use Information To Make Your Case - Current Practices*. Community Action Association of Pennsylvania Management and Technical Assistance Publication Series Number 1, Harrisburg, PA: © Community Action Association of Pennsylvania, 1996.

evolve to become management information systems, strategic tools for program managers to tell the story of how clients' lives and their communities improved as a result of their agency's interventions.

What Is Our Story? Back To The Future

In August of 1994, the National CSBG Monitoring and Assessment Task Force was chartered by the Director of the Federal Office of Community Services to develop a results-oriented management and accountability approach for CSBG-eligible agencies. The Task Force contained representatives from CAAs, state offices, and Federal partners. They used the CSBG legislation as a framework for identifying six umbrella goals for CAAs:

- Low-income people become more self-sufficient.
- The conditions in which low-income people live are improved.
- Low-income people own a stake in their community.
- Partnerships among supporters and providers of services to low-income people are achieved.
- Agencies increase their capacity to achieve results.
- Low-income people, especially vulnerable populations, achieve their potential by strengthening family and other supportive systems.

These proposed national goals reaffirm the original mission legislated in 1964 and are the foundation for the story needing to be told by every Community Action Agency in the Commonwealth: How well does my agency accomplish these goals?

A good story documents the facts and conveys the message that agencies and their managers are results- or outcome-oriented. Good storytelling tells the tale of success and ensures that the outcomes are understood and supported by the public. The basis for all our stories is how well we have achieved our goals.

Your story has to demonstrate:

- what results or outcomes you are trying to achieve for your clients and their communities.
- how your agency has a positive impact on clients and their communities.

The Management and Technical Assistance Publication Series is supported by a grant from the Pennsylvania Department of Community and Economic Development, Bureau of Community Empowerment. Permission is granted to use this article with the following citation: Hunnemann, E.W., and Richmond, F.K., *Storytelling For Managers or How To Use Information To Make Your Case - Current Practices*. Community Action Association of Pennsylvania Management and Technical Assistance Publication Series Number 1, Harrisburg, PA: © Community Action Association of Pennsylvania, 1996.

- how your managers maximize the impact on clients and their communities.
- how you make the most efficient use of scarce resources.
- how you target your resources to achieve maximum results.

The proposed general goals from the CSBG Task Force on Monitoring and Assessment are useful to frame our story.

Using the Best Information

Your story is only as good as the supporting cast. In this case, your cast is the best data you can bring to the stage. Systematically collecting data on the following eight questions provides the basis for a strategic management information system, the tool for the story and the storyteller.

1. How many clients are you serving?¹
2. Who are they?¹
3. What services do you give them?¹
4. What does it cost?¹
5. What does it cost per service delivered?¹
6. What happens to the clients as a result of the service?¹
7. What does it cost per outcome?¹
8. What is the return on investment?

The “real” story can be found in how well you can answer questions 6,7 and 8. This is the story to tell the public, funders, elected officials and other human services agencies. Answers to the first five questions in a client-specific and not-aggregated format can support the answers to the last three questions. Community Action Agencies have reported on questions 1-5 for many years, but in a format not conducive for telling the story.

The Management and Technical Assistance Publication Series is supported by a grant from the Pennsylvania Department of Community and Economic Development, Bureau of Community Empowerment. Permission is granted to use this article with the following citation: Hunnemann, E.W., and Richmond, F.K., *Storytelling For Managers or How To Use Information To Make Your Case - Current Practices*. Community Action Association of Pennsylvania Management and Technical Assistance Publication Series Number 1, Harrisburg, PA: © Community Action Association of Pennsylvania, 1996.

An example of the new style of respecting is *Not Just the Poor*, a report on the Economic Impact of the Tri-County Community Action Agency² in Bridgeton, New Jersey, released in the spring of 1996. It explores how the agency contributes to the commercial life of the community, not just the social impact of the agency's programs.

"The report was not released without controversy," said Nancy Diehl, Program Coordinator. "We knew we would be criticized and people would complain, but people complain and criticize us anyway without knowing what we really do for the community. Why shouldn't we put our spin on it?"

Missouri's CAAs include return-on-investment projections for each objective they submit in their CSBG annual applications. Lead by Charles H. McCann, CCAP, the CAAs are able to show their programs' impact on savings of public and private funds. Virginia's agencies report similar information annually to their legislators.

Epilog

In the current environment of human services, it is as important to document and publicly share or market the success of your programs and services as it is to manage an efficient and effective organization. Community Action Agencies must be perceived as major players in their communities and contribute to positive change benefiting all citizens. Simply put, Community Action Agencies must do a good job and tell everyone about it, the essence of storytelling!

¹Source: Reginald Carter, *The Accountable Agency*, Sage Human Services Guide 34, 1983

²Tri-County Community Action Agency
143 West Broad St.
Bridgeton, NJ 08302
(609) 451-6330