**Demonstrating SVP’s Impact**

**Outcomes Evaluation Tools – Capacity Building**

**Instructions**

June 2014

The “Demonstrating SVP’s Impact” (DSI) tool suite allows SVPs to track outcomes and tell compelling and evidence-based stories about their impact. The goals of DSI tools are to:

* Assist SVP affiliates in **documenting their impact in local communities,**
* Provide concrete data to **help affiliates improve their programs,**
* Identify common outcomes across the SVP network that **demonstrate the value of the SVP model.**

The DSI project grew out of research on key sustainability factors for SVP affiliates conducted in 2003. The research identified that affiliates had minimal capacity to document their impact or track their performance. The ability to communicate their contributions to their local communities in a more systematic way is critical to attracting and retaining Partners and also to garnering support from funders in the community.

Three SVP Affiliates—Seattle, San Diego and Arizona— worked with SVPI for 18 months to identify priority outcomes and develop a set of tools to help affiliates in the network demonstrate their impact. The process was conducted by Blueprint Research and Design, a philanthropy consulting firm. This project was supported by funding from the Kellogg Foundation, the Surdna Foundation, the Lodestar Foundation and the Hewlett Foundation.

Through the DSI project, SVPI identified eight key outcomes for the dual SVP mission of Philanthropy Development and Nonprofit Capacity-Building.

**Philanthropy Development Outcomes:**

1. Increased Partner knowledge about nonprofits and community issues
2. Increased levels of Partner giving
3. Partners become more strategic in their giving
4. Partners become more involved in the community

**Capacity-Building Outcomes:**

1. Investees are highly satisfied with SVP relationships
2. Investees receive increased time, money and connections from SVP Partners
3. The organizational capacity of Investees is strengthened
4. The programmatic effectiveness of Investees is improved

# Overview of the Tools & Instructions

What is in these instructions?

These instructions provide everything you need to gather, analyze, and report on critical data using three tools developed through the DSI program:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Philanthropy Development** | **SVP Partner Outcomes Survey** |  | **Capacity Building** | **SVP Investee Outcomes Survey** |
| *Outcomes Assessed:* | *Outcomes Assessed:* |
| - Amount of partner giving | - Investee satisfaction with SVP |
| - Strategic giving by partners | - Time, money, and connections received by investees through partners |
| - Partner involvement in the community |
|  |
| **Grant Committee Self-Audit** | **Most Significant Change Tool** |
| *Outcome Assessed:* | *Outcomes Assessed:* |
| - Increase in partner knowledge about  nonprofits and community issues | - Increase in organizational  capacity |
|  | - Improvement in programmatic  effectiveness |

Before diving in to an individual tool, please take a few minutes to read this first section, which helps you understand and answer a few key questions before you start:

1. What other files or information do I need?
2. What do I need to know about administering my surveys?
3. Can I customize my surveys?

### What other files or information do I need?

These instructions refer to five other files:

* + The MS Word document with the annotated report template for Capacity-Building Outcomes. *(DSI Capacity Building Outcomes – Report Template.doc)*
	+ The MS Excel spreadsheet with the analysis macro for the Investee Survey data. *(DSI Investee Survey Analysis Worksheet.xls)* **For the macros in this file to work, you must have Excel’s macro security setting no higher than “Medium.”** (Go to Macros>>Security.)
	+ Three MS Word documents with the Most Significant Change worksheets and FAQ in editable form.

These are available to SVP affiliates in the intranet Resource Center. If you do not know how to log into the Intranet contact Katalin Marky at katalin@svpi.org or 206.552.7722.

You will also need access to SurveyMonkey, an online survey tool. If you do not have the SVP Network SurveyMonkey login and password, please contact Katalin at katalin@svpi.org or 206.552.7722. The URL for SurveyMonkey is: [www.surveymonkey.com](http://www.surveymonkey.com).

### What do I need to know about administering my surveys?

The Investee Outcomes survey is designed to be administered electronically via [www.surveymonkey.com](http://www.surveymonkey.com). In administering this survey, you have a few choices:

**Anonymity vs. confidentiality:**

* Anonymous responses mean that no identifiers are collected from the respondent. It is impossible ever to attach a respondent with a response.
* Confidential responses mean that you have the *ability* to identify respondents with their answers, but you promise to treat that information as confidential and to not identify any individual responses to an external audience.

**Targeted vs. generic invites & reminders:**

* Individually targeted invites & reminders: SurveyMonkey has a feature that allows you to individually invite respondents from an email list, and it tracks responses so you can follow up in a targeted manner with non-respondents. This system does individually identify the respondents using the email address and any name or other identifier information that you have in your original invitation list. Thus, you can assure respondents of confidentiality (you will not identify them externally with their responses) but not anonymity (because you still have the ability to connect respondents with their answers).
* General invites & responses:SurveyMonkey can provide you with a general link that you send to everyone. Unless you ask them to fill in their name as part of the survey, no respondent identifiers are collected. This means that when you do follow-up reminders, you will need to email all invited respondents without knowing whether or not they have already completed the survey; this reminder method has been shown to be less effective than a personalized reminder.

**The bottom line – which method should I pick?** You should decide based on what’s most important to you –

…the ability to individually target invites and follow-ups?

…the ability to promise strict anonymity or confidentiality?

…cost and simplicity?

### Can I customize my survey?

Do not change the survey questions in the templates. These questions have been designed by professional evaluators for reliability and methodological soundness, and have been pilot tested and refined by SVPs. In addition, the ability of the SVP Network to roll up or compare responses across the network is dependent on everyone using the same survey instrument. It is in the network’s interest to be able to articulate our *collective* impact as well as local impact.

However, you can *add* additional questions to the *end* of your survey. **Please note:** do not insert questions between existing survey questions, as this makes it much more difficult to collate responses for network-wide reporting.

The survey design feature in SurveyMonkey is fairly straightforward. If you would like assistance in learning how to do this, feel free to contact the Network Office.

# Capacity-Building Outcomes

Following is everything you need to gather, analyze, and report on critical data concerning SVP’s impact on *capacity building* using two tools:

1. The ***Investee Outcomes Survey*** tool, which measures two Capacity-Building outcomes:

* Investee satisfaction with SVP
* Time, money and connections received by Investees through Partners

2. The ***Most Significant Change*** tool, a qualitative data collection instrument that helps identify and document specific examples of organizational change, addressing two Capacity-Building outcomes:

* Strengthened organizational capacity
* Improved programmatic effectiveness

These two tools can be used independently, but will provide the most comprehensive information if used together. They are a bit more complicated to use and analyze than the Partner Outcomes survey. A few tips for maximizing effectiveness:

* + Be sure to prepare Investees to provide you with this information and feedback by telling them about your expectations as early as possible, ideally at the start of the funding relationship.
	+ Both tools are most appropriate for Investees that have already completed at least a year of investment with SVP.
	+ Best results will come from separating this feedback process from funding decisions as much as possible, and so the best time for administering the tools is soon after reinvestment decisions have been made.
	+ Once you identify the appropriate timing within your investment cycle, the tools can be administered on an annual basis.

The instructions are divided into three parts.

* + **Part A** (page 8) provides step-by-step instructions on data collection for the Investee Outcomes Survey using SurveyMonkey, including timelines and tips on how to maximize response rates.
	+ **Part B** (page 14) provides step-by-step instructions on using the Most Significant Change (MSC) tool.
	+ **Part C** (page 22) is instructions on analyzing your Investee Survey data. The report is provided separately as an editable MS Word document with comments that explain exactly how to use the data to create each calculation. There is also an Excel document with pre-programmed macros to automate some of the survey data analysis.

Implementing the process is straightforward. Please do not hesitate to contact the SVP Network Office for assistance at 206.552.7722.

## Instructions for Collecting Data – Investee Outcomes Survey

The step-by-step instructions listed below will guide you through the process of preparing your Investees to expect the survey, administering the survey itself, and following up with non-respondents. Affiliates may administer the Investee Survey as a stand-alone tool or in conjunction with the Most Significant Change (MSC) tool. Whichever path you select, be sure to prepare Investees by telling them about your expectations as early as possible, ideally, at the start of the funding relationship.

#### An Important Note About Partner Volunteer Hours & Contributions

One important goal of this survey is to quantify the value of time, money and connections provided to each Investee through Partners. The ability to leverage many kinds of resources is one of the unique value-adds of the SVP model - and therefore an important, tangible and compelling outcome measure.

*Relying entirely on Investee estimates of Partner volunteer time can be highly inaccurate*. Investees have no way to accurately track how much time Partners spend on projects, since much of it happens off site. They may not remember with accuracy what was done within the 12-month time frame covered in the survey. Without knowing who your Partners are, they have no way to identify new financial contributions that came from other Partners.

**To get the best results from these questions,** **you should provide some information to the Investee as prep material for completing the survey:**

* + Provide each Investee ahead of time with a list of Partners who have volunteered with the Investee in the past year, and the projects they worked on.
	+ Provide each Investee ahead of time with a complete list of your Partners, which Investees can use to identify whether any have made direct gifts to the organization during the year.
	+ When the survey results come in, compare the Investee’s estimates of volunteer hours with your internal data on the number of hours Partners spent on various projects throughout the year. Try to identify and reconcile any significant differences.

#### Overall Process & Timeline

From the first step of the process to a finished report requires 9 to 10 weeks. Avoid the December and August holiday and vacation seasons. Try to logically integrate the process into your SVP’s overall cycle of investment/reinvestment decisions, assessment of capacity-building needs, and review of volunteer projects.

The overall timeline for the survey process is roughly as follows:

* **Week One:**
1. Summarize the Partner volunteer projects that you have tracked for each Investee. (See above: **An Important Note About Partner Volunteer Hours**.)
2. Send an email request to SVP Network Office staff to create a copy of the survey in your SurveyMonkey folder.
* **Week Two:** Send your Investees a “heads-up” email. You will get more complete survey results if you include a summary of the Partner projects that you have tracked for the Investee, and a complete list of your current Partners.
* **Week Three:** Send the survey out and allow three weeks for responses.
* **Week Five:** At the two-week mark, send a reminder to those who haven’t responded. Ideally, you should aim for a 100 percent response rate. SurveyMonkey allows you to see which email addresses have and have not responded.
* **Week Six:** Send one more reminder 24 hours before the deadline.
* **Week Seven:** Once you have received all of the responses, use the report template (Part IIIF) to create a thorough report within two – three weeks.
* **Week Nine or Ten:** Make the report available to relevant stakeholders, and please send a copy to the Network Office!

#### Step-by-Step

**Step 1. Once you decide to survey your Investees, contact Katalin at the Network Office to request a customized version of the most current copy of the survey in your affiliate’s SurveyMonkey folder OR to export the survey template to your own SurveyMonkey account.**

* If you want to add additional questions, use the Design feature to edit. When your survey is ready to send, make sure the collection method is open - go to the list of surveys in your SurveyMonkey folder and click on collect icon on the right of this survey, then on the box icon on the left to “open” it.

**Step 2. Notify Investees one week before you email them the actual survey and cover letter.**

* Send a “heads up” email to all Investees so that they know to expect the survey. This will maximize response rates. A sample letter is included in Part B and a hard copy of the survey itself is included in Part C.
* This is a good time to provide each Investee with the prep materials:
	+ A list of Partners who have volunteered with the Investee in the past year and the projects they worked on; and
	+ A complete list of your Partners, which Investees can use to identify whether any have made direct gifts to the organization during the year.

**Step 3. Customize your cover letter**

* Using the sample cover letter in Part B as a template, customize your own version before you get into SurveyMonkey.

**Now, decide whether you want to send:**

* a *generic* invite and reminder (allows for true anonymity; doesn’t track respondents; has a lower response rate) – Go to Step 4.
* *targeted* invites and reminders (doesn’t provide anonymity; allows you to track respondents; produces a better response rate) – Skip to Step 5.

***Don’t understand this question?*** *Refer to Part I: “What do I need to know about administering my surveys?” (page 5)*

**Step 4: You do not want to use the individualized invite and reminder feature:**

* From the My Surveys list, click the Collect icon.
* Click “New Collector.”
* Select “Web link collector.”
* In your own email software, create an invite message using the cover letter that you drafted in Step 3. Paste in the link generated by SurveyMonkey as the place people should go to fill out the survey.
* You might want to let people know in your cover that: “You can stop and pick up where you left off - SurveyMonkey will place a cookie on your browser, so you would need to use the same computer to resume, and have your browser set to accept cookies.”
* Send the message.
* *You should send a reminder two weeks after sending the original message.*
* **You are done! You don’t need the rest of the steps*.***

**Step 5. You do want to send and track individual invites and reminders: When you are ready to administer the survey, create a list with the email addresses and names of your Investee contacts (one per investee).**

* If you use Salesforce.com, run the report called “[Investee Contact Emails for SurveyMonkey](https://na3.salesforce.com/00O50000001W7C7)” from the SVP Custom Reports folder.
* Click “Export Details.”
* In the Export File Format picklist, choose “Comma Delimited .csv”
* Click “Export”
* Save the file to your desktop or hard drive.
* Open the file using Microsoft Word.
* Find and replace all of the quotation marks (“), leaving the replace field blank.
* Copy the list.

**Step 6. Log in to SurveyMonkey.** (Contact the Network Office for the network’s user account and password information.)

* Open your survey.
* Click on the “Collect Responses” tab in the top right corner.
* Click on “New Collector” and Select “Email collector”.
* Select “Add recipients manually.”
* Paste your list in the text field.
* Click “Save And Continue”
* Select: Send to New/Unsent
* Click “Save And Continue”

**Step 7. Create Message.**

* Enter the text for the email subject. Copy the text of your cover letter you customized earlier into the Message box.
* In the reply address box, enter the email address you would like people to see as the sender of the message. This address will also receive error messages when a message is undeliverable.
* Click the “Save and Continue” button.
* If you want to send the message at a later time, click the “Schedule” button. If you want to send the message immediately, click “Send Now”.

**Step 8. Track responses and send reminders.**

* To track email response, log in to SurveyMonkey and click on “My Surveys” at the top of the page.
* Click the “Collect” button to the right of your survey in the list.
* Click the relevant collector name (it will likely be the only one in the list).
* Click on the “Recipients” button on the left to view who has responded.
* ***You should send a reminder two weeks after sending the original message.***
* To send a reminder message, click on the “Messages” button on the left, then click on the “Create New Message” button on the right. Follow the procedure in Step 7 (starting from the 2nd bullet), choosing “Not Responded” for the recipients and changing the text of the message.

If you have any questions or problems in sending out this survey and/or following up, contact Katalin at the SVP Network Office at katalin@svpi.org or 206.552.7722.

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 **Instructions for Collecting Data – Most Significant Change**

The Most Significant Change (MSC) is an evaluation method to help SVP affiliates understand their impact on Investee capacity building. Affiliates should ask Investees to and document their *stories* of change on an annual basis. Affiliates may administer MSC as a stand-alone tool or in in conjunction with the Investee survey. Whichever path you select, be sure to prepare Investees by telling them about your expectations as early as possible, ideally, at the start of the funding relationship. We also strongly recommend you administer this and any other Investee outcomes tools AFTER refunding decisions have been made.

At the end of this process, you will have two products: 1) a story you can use externally to illustrate the impact of your capacity building work with Investees which can be used in communications, fundraising, and team building; and 2) insights and themes on organizational capacity change. SVPs and Investees will directly benefit from having the stories generated from this process, which will promote organizational learning.

In brief, MSC is a process for systematic, structured reflection that will help Affiliates and their Investees identify and document specific examples of change in organizational capacity, as well as SVP’s role in catalyzing that change. These instructions will provide you, the SVP affiliate, with a step-by-step guide on implementing the MSC process, broken into the following seven steps**[[1]](#footnote-1)**

1. Selecting your review committee
2. Collecting stories from Investees that document their most significant change and why it is important to them
3. Reviewing stories and selecting the most significant
4. Verifying stories (optional)
5. Analyzing the data and providing feedback to Investees
6. Using the data
7. Sending stories to the Network Office

**Step-by-Step**

**Step One: Selecting your review committee**

The review committee is the group that will gather to read all Investee stories, provide analysis and reflections on the stories as a group, and decide on the one that represents the most significant change. There isn’t an ideal number to have on your committee, but we would recommend anywhere from 4-8 people. The committee members should consist of a cross-section of your local SVP’s key stakeholders and decision-makers (for example: grant committee members, active volunteers, a board member, and less active members).

Including current or past Investees in your committee could increase your SVP’s transparency in process, signal to Investees that you are truly committed to learning about their organizational capacity changes, and help diffuse power differentials that exist between funders and grantees. You can have Investees participate on the review committee, but be aware of a couple of caveats: first, if they are not compensated for their time, participation could be viewed as burdensome. Second, it might be awkward for Investees to review stories submitted by their peer organizations and to review their own stories as part of the mix. If current Investees participate in the review process, they would have to abstain from, or even leave the room during discussions and voting about their organization.

**Step Two: Collect stories from Investees**

You should collect the data annually. Exactly when you choose to collect the data is up to your local affiliate. You may find it most useful to collect the data as part of your Investees’ annual reporting. Or you may prefer to separate these activities to reduce an Investee’s perception that their response to the story is connected to their chance of refunding.

The form for Investees is included in this guide. You can determine how much time you want to give Investees to complete the form, but ideally, provide the Investee advance notice about the MSC process. You may want to include the MSC FAQs document (also included) so Investees can see the bigger picture and understand how their work will be used. Again, we highly recommend that you communicate that the committee’s assessment of their story **is not connected to any** future grant decisions. This assurance is essential to getting honest stories. Finally, Investees may not be used to telling their stories in this way, so it might be helpful to include a sample story with the blank form. A sample for use in the first year is located in the FAQs. Over time, you will have examples from your own Investees to include. It’s important to encourage story narrators to use as much detail as possible.

Each Investee must ultimately submit only one story. You may want to encourage creative ideas for collecting stories, such as bringing a tape recorder to a staff meeting to elicit stories (and then transfer the story to the form), or having one staff member “interview” other staff members.

***Troubleshooting***

*Investees are having a hard time understanding the question*. You may get phone calls or emails from story narrators unsure just what you are looking for. It may take some re-phrasing of the questions to help elicit a good story. For example, in a conversation, ask:

* How have you been involved in the organization?
* What are the important changes have occurred over the past year?
* What problems were there and how have you addresses them?
* How has SVP’s work made a difference in how your organization operates?

…and you may start to elicit stories. You can then encourage the Investee to consider these as possible stories for significant change.

*“Nothing has changed, so what can we report?”*In this case, often the story teller is using an absolute idea of “significant.” Encourage the story teller to think of any change, and then what might be significant about that change *relative* to previous circumstances.

**Step Three: Reviewing stories and selecting the most significant**

One committee member should be in charge of making sure all Investees have submitted stories, copying them for the review committee, scheduling the meeting, and facilitating the decision making at the meeting. Note that it’s not necessary to send the stories out ahead of time (unless you have a very large number of stories–this is for you to decide). Many people have found that it is most powerful if someone reads out loud the stories when everyone is gathered. Each SVP, however, should implement what is most comfortable and appropriate in their local contexts.

This step consists of three parts:

1. Comment and reflect on each story.
2. Choose the story that best exemplifies the organizational change SVP promotes.
3. Document the rationale behind your choice.

***1. Comment and reflect on each story***

After each story is read, the committee should comment and provide reactions as to how the story does or does not exemplify the kind of capacity growth SVP seeks to catalyze. You should document this discussion, because you’ll need to collect and present these ideas in some form to the Investees at the end of this process. (Since the feedback to the Investees is an important and unique aspect of the MSC process, it’s important to take careful notes and present them in a meaningful way, rather than simply a short sentence or two.)

The following criteria can serve as a starting framework for discussion. Each story should be discussed against:

* The extent to which the story of capacity change itself is important to the organization.
* The extent to which the SVP role is meaningful in the story of capacity change.
* The extent to which the story of capacity change links to improvements in program effectiveness.
* Additional criteria you would like to add (such as evidence that the change will be sustainable, evidence of organizational learning accompanied change, or “out of the box” thinking versus following a rule of thumb procedure).

***2. Choose the story that best exemplifies organizational change***

After of the committee discusses each story, go back and choose the one story that the review committee thinks best exemplifies the capacity change that SVP wants to promote. The committee should not simply come to agreement without having the in-depth conversation about *why* members believe a story is most significant. The committee’s rational is, in many ways, more important than which story is actually chosen.

You should facilitate the decision making process that is most appropriate for your SVP. Try to choose one story, but if you must, you may select more than one story. Again, the important piece of this step is the insights gained through discussing organizational change and your ability to share those insights with other stakeholders after the meeting.

***3. Document the rationale behind your choice.***

Now that you have provided comments and thoughts on each story and selected the one that you believe most exemplifies organizational change, you must document the rationale behind your choice of story. By doing this, you will be able to communicate to a wide range of constituents *why* the story was selected, and you will gain insight into the range of organizational change and what type of change is most important for your SVP.

Multiple reasons may emerge. The key is to keep in mind that the insights you gain from articulating the rationale behind your choice of significant change creates valuable insights for SVP and Investees.

Do not discard stories that are not selected. It is important to document why it was not selected for the feedback loop, but also to keep record of the process. In addition, if you do some systematic content analysis of the stories some day, you will want to refer to all the stories submitted, not just the stories that were ultimately selected.

**Step Four: Verifying stories (optional)**

Verification might be necessary, because there is always some concern that stories’ significance are inflated or describe real events that are misunderstood. Letting participants know ahead of time that a verification process is in place and that stories may be made public should counteract this effect and improve overall quality of the stories. At the same time however, a verification step can have negative consequences. Investees may feel that they are not trusted, or will report what they feel like the SVP affiliate wants to know. If you do add a verification step, you may want to communicate to Investees that it is “exploration” or “follow-up.”

This step can be as informal or formal as you’d like. Many SVP affiliates know their Investees fairly well and will be able to verify the stories simply through their everyday knowledge of the organization. You may opt to establish a more formal verification process if you wish, which would include a follow up phone call or visit to the Investee to discuss the story. You may find that a verification process is not necessary.

**Step Five: Analyzing the data and providing feedback to Investees**

Feedback to nonprofits that are investing time into submitting evaluation data is an important step in any evaluation and monitoring process. Often, funders ask grantees to submit reporting data and subsequently give very little comment about their reporting. Giving feedback to Investees will also increase the transparency of your affiliate’s process, create an ongoing dialogue about the value of organizational capacity building, and help Investees prepare even better stories of significant change for the next round.

You can determine exactly what form of feedback you provide to Investees. You should explain which significant change story was selected and why, along with insights drawn during the process of reviewing all the stories. Your report should discuss some of the themes and insights gained throughout the entire reflection process, both commenting on the individual stories (you may choose to distribute all stories) and then highlighting the story that best exemplifies SVP’s desired change. Be sure to communicate that just because stories were not chosen does not mean they had deficiencies; it simply means that other stories better reflected the changes SVP cares about. A non-chosen story might be a very significant change for an organization but not chosen because, for example, SVP was not involved to the extent that they were in the chosen story.

The following questions will help you frame your insights (see also the sample Synthesis Worksheet with these questions to which your review committee can refer):

* What is the best example (story) we can provide about the reasons SVP values capacity building, how it connects to improved program impact and the unique contribute SVP can make the capacity building process?
* When looking across all the stories, what emerges as the types of capacity building that Investees most value? Are there any patterns that show where our SVP makes the biggest difference?
* When looking across all the stories, are there any notable absences? For example, did our SVP invest most of its volunteers in building a type of capacity that none of the Investees are citing as an area of most significant change?
* Across stories, to what extent is the connection between capacity building and improved program impact evident?

The feedback can be given one-on-one, or you may consider doing a more formal report with the entire Investee cluster as an audience.

**Step Six: Using the data**

Once you have documented all of the criteria you used for selecting a story, you can use the two primary “deliverables” as such:

1. The story itself. You can use these in your communications and marketing, distribute among staff or other key stakeholders, include in newsletters, etc.
2. Summary of cross cross-cutting themes (see the synthesis worksheet). You can use this to provide “insights” back to Investees and to inform your own learning about organizational capacity,

Since learning and reflection are such an integral part of the MSC process, you also might want to consider holding a Partner-Investee forum to discuss the findings, the process, and the learning.

**Step Seven: Send stories to the Network Office**

Submit your chosen story to the Network Office. The Network Office will collect stories from each affiliate to represent real stories of significant change to funders and other stakeholders. When enough affiliates are using the MSC process, the Network Office will also be able to institute its own review process and look for the best overall stories and determine affiliate-wide themes.

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**Instructions for Analyzing Survey Data and Writing the Report**

To help you analyze your Investee Outcomes data and summarize it in a report, we have created a sample of the report. This sample report includes data from both the Investee Survey and the Most Significant Change Tool.

* The sample report is provided in the Resource Center. Items in blue, as well as graphs, are the items you’ll replace with your own results.
* The accompanying (separate) MS Word document has detailed, annotated instructions that show you how to come up with each calculation. The annotated instructions are in the Comments. Make sure when you print out that document or view it on your computer, that you display the Comments. This can be done by selecting View>>Markup. To print comments, select “Document showing markup” under “Print what” on the print dialog box.
* The template report only contains survey data from the survey template. If you have added additional questions to your Outcomes Survey, you will need to add sections in your report to represent that data. The data itself, on an aggregate basis, will be accessible through the “Analyze Results” function in SurveyMonkey.
* Once you have a complete report, you may want to develop a one-page sheet with the highlights for your affiliate, particularly for your board or external audiences to which you want to highlight your most significant accomplishments.

**Viewing and Analyzing Investee Survey Data**

You can see results of your survey through SurveyMonkey’s Analyze Results feature; although this packaged reporting will not provide you with everything you need for the template report, it is an easy and user-friendly way view some of the results. First, you need to close the survey so that no one else can respond. Go to the list of surveys in your SurveyMonkey folder and click on the Collect icon. Click on the Open link in status, and click Stop Collecting Now. Then click “Analyze Results” (tab in top right corner), and print out a hard copy of the report that is generated.

The data generated when you click “Analyze Results” in SurveyMonkey.com is aggregate data based on ALL respondents. You may want to see the data according to subsections of your data set, for example, Investees in their first year of funding versus those with more years of experience with SVP. You can get this easily from SurveyMonkey using Filters in the Analyze feature.

**To help you analyze your data for the template report,** we have created a macro that will allow you to download the data from your surveys from SurveyMonkey.com into an Excel worksheet that will allow you to easily extract the key data for your report. Instructions for downloading the survey from SurveyMonkey and importing the results into the Excel worksheet are summarized below. **For the macros in this file to work, you must have Excel’s macro security setting no higher than “Medium.”** (Go to Macros>>Security to adjust this setting.)

**Step 1. Download the survey from SurveyMonkey**

* Once the Investee surveys have been received, log on to the SurveyMonkey site.
* Click on the “Analyze” button for your Investee survey.
* On the next screen, click the little triangle next to “EXPORTS” in the left-hand column, then click “Export All”.
* On the next screen, select the following options:
	+ Choose “All responses data”
	+ “Opens in Microsoft Excel”
	+ Choose Columns: “Condensed”
	+ Choose Cells: “Numerical Value (1-n)”
* Click “Export”.
* Wait for a few seconds and then download the file as it becomes available. It will be a Zip file.
* Use an Unzip program (like WinZip) to open the file. One of the enclosed files will be called “Sheet\_1.xls”. Extract this file and save it locally.
* Go to the SVP Resource Center in the intranet and open the Excel file “Investee Survey Analysis Worksheet.” Save the file to the same folder in which “Sheet\_1.xls” is saved.

**Step 2. Import the survey results into the Excel “Investee Survey Analysis Worksheet”**

* Open the Excel document “SVP Investee Survey Analysis Worksheet.” **NOTE:** You may receive a security warning about Macros. Select “Enable macros.”
* Make sure the document is open to the first tab, “Raw Data,” and that A1 is the selected cell.
* From the **Data** menu, select “Import External Data > Import Data”.
* A window will pop up allowing you to open the external data file. Browse for the “Sheet\_1.xls” file and open it.
* A “Select Table” window will pop up. Click OK.
* The next window will ask you where you want to put the data. “Existing worksheet” should be selected and in the blank it should read “=$A$1” (without the quotes). Now click “OK”.
* The survey data should now be imported into the “Raw Data” worksheet. With this imported information, the document should automatically make calculations and graphs based on the survey data. The tabs “Investee Satisfaction” and “Value” contain the calculations and the other tabs contain the graphs. **NOTE:** On the “Investee Satisfaction” sheet, a “#DIV/0!” means that all investees answered N/A or skipped the question, which is fine.
1. This guide should be all you need to implement MSC, but if you wish for even more information, you can refer to *Most Significant Change Technique: A Guide to its Use* by Jess Dart and Rick Davies, April 2005, upon which much of this guide is based. [↑](#footnote-ref-1)