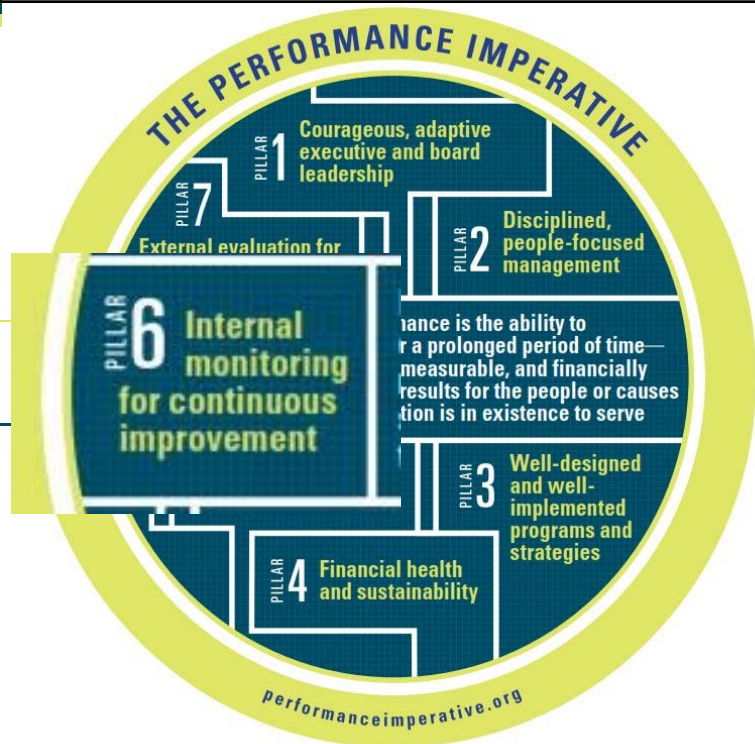


THE PERFORMANCE IMPERATIVE

A FRAMEWORK FOR
SOCIAL-SECTOR EXCELLENCE



PILLAR 6 INTERNAL MONITORING FOR CONTINUOUS IMPROVEMENT

In high-performance organizations:

THE BOARD, MANAGEMENT, AND STAFF:

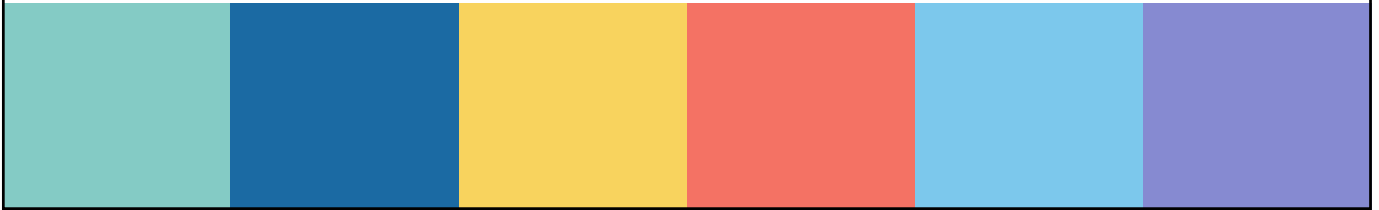
- Produce frequent reports on how well the organization is implementing its programs and strategies, using these reports to chart course corrections and make operational adjustments and programmatic improvements on an ongoing basis.
- Make the collection, analysis, and use of data part of the organization's culture and daily operations, ensuring that people throughout the organization understand the key metrics. They invest in training and coaching to help staff gain comfort in working with data as a natural part of the job.
- Draw extensively on lessons from organizational assessments and evaluations of programs serving similar causes or populations.

Nonprofit Data:

Making the Connection Between Numbers & Narrative

May 2019 Nonprofit Network

Kathy J. Krey, Ph.D.



Quantitative
Qualitative

Primary
Secondary

{Defining Data}



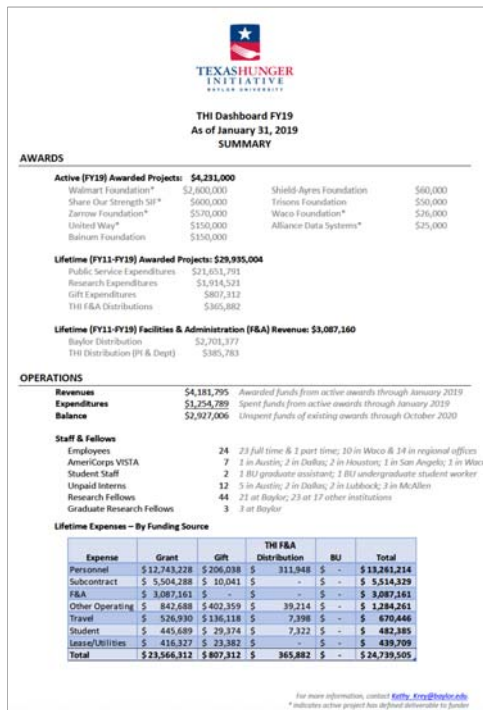
{Data overload}

DATA DRIVEN

Transparent

Accessible

Actionable



ACTIVE AWARDS

	Sponsor	Title/Purpose	Dates	Time (in Months)			Expenditures (in Dollars)			
				Awarded	Spent	Remaining	Awarded	Interest/Other	Spent	Remaining
Research	Walmart Foundation	"Food Assistance Collaboration & Research"	11/01/18 - 10/31/20	24	3	21	\$ 1,196,748	\$ -	\$ 118,489	\$ 1,078,259
	Walmart Foundation	"Food Assistance Collaboration & Research"	11/01/18 - 10/31/20	25	3	21	\$ 1,403,252	\$ 8,693	\$ 144,240	\$ 1,267,705
Public Service	Share Our Strength (SIF)	"No Kid Hungry Social Innovation Fund"	07/01/18 - 06/30/19	14	7	7	\$ 600,000	\$ -	\$ 243,877	\$ 356,123
	Zarrow Foundation	"Hunger Free Oklahoma Grant"	04/01/18 - 03/31/20	48	34	14	\$ 570,000	\$ -	\$ 490,526	\$ 79,474
	United Way (Dallas)	"Dallas Coalition for Hunger Solutions"	07/01/18 - 06/30/19	36	31	5	\$ 150,000	\$ -	\$ 129,920	\$ 20,080
	Shield-Ayres Foundation	"Texas Hunger Initiative Support"	06/25/18 - 05/31/21	35	7	28	\$ 60,000	\$ -	\$ 10,519	\$ 49,481
	Bairum Family Foundation	"Hurricane Harvey Relief"	08/01/18 - 07/31/20	43	34	9	\$ 30,000	\$ -	\$ 60,000	\$ -
Gift	Trisons Foundation	Fund TH's AmeriCorps VISTA program								
	Bairum Family Foundation	Support TH's policy & fundraising work								
	Waco Foundation	"Waco Foundation-THI collaboration"								
	Alliance Data	"Data for Good"								

Funder	Walmart (Pub. Sec.)	Walmart (Research)	SOS - SIF (Yr 4)	Zarrow	United Way (Dallas)	Shield-Ayres Foundation	Waco Foundation	Bairum Family Foundation	Trisons Foundation	Alliance Data	Existing Awards Total
Project/Dept #	10030127	10030128	10030126	10030115	10030109	10030125	030460	043-4307	043-4307	043-4307	
Revenue - Budget	\$ 1,403,252	\$ 1,196,748	\$ 600,000	\$ 520,795	\$ 150,000	\$ 60,000	\$ 26,000	\$ 150,000	\$ 50,000	\$ 25,000	\$ 4,181,795
Revenue - Actual	\$ 1,431,945	\$ 1,196,748	\$ 243,877	\$ 490,526	\$ 129,167	\$ 20,000	\$ 26,000	\$ 150,504	\$ 50,000	\$ 25,000	\$ 5,743,767
Balance	\$ 8,693	\$ -	\$ (156,123)	\$ (30,269)	\$ (20,833)	\$ (40,000)	\$ -	\$ 504	\$ -	\$ -	\$ (438,038)
Expenses - Budget	\$ 1,403,252	\$ 1,196,748	\$ 600,000	\$ 520,795	\$ 150,000	\$ 60,000	\$ 26,000	\$ 150,000	\$ 50,000	\$ 25,000	\$ 4,181,795
Expenses - Actual	\$ 144,240	\$ 118,489	\$ 243,877	\$ 490,526	\$ 129,920	\$ 10,519	\$ 16,623	\$ 48,792	\$ 2,151	\$ 252	\$ 1,254,789
Balance	\$ 1,259,012	\$ 1,078,259	\$ 356,123	\$ 30,269	\$ 20,080	\$ 49,481	\$ 9,977	\$ 51,208	\$ 47,849	\$ 24,748	\$ 2,927,006
Actual Net	\$ 1,267,705	\$ 1,078,259	\$ -	\$ -	\$ (753)	\$ 9,481	\$ 9,977	\$ 51,712	\$ 47,849	\$ 24,748	\$ 2,488,978
Expenses by Category											
Personnel - Salary & Fringe	\$ 118,173	\$ 96,462	\$ 153,869	\$ 394,480	\$ 96,110	\$ 10,519	\$ 16,623	\$ 28,400	\$ -	\$ -	\$ 915,037
FAA	\$ 13,113	\$ 10,772	\$ 67,793	\$ 44,593	\$ 11,811	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 148,081
Lease/Utilities	\$ 9,183	\$ 9,198	\$ 15,725	\$ -	\$ 7,332	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 41,438
Travel	\$ 2,167	\$ 57	\$ 5,077	\$ 17,638	\$ 3,066	\$ -	\$ -	\$ 10,392	\$ 262	\$ 45	\$ 38,765
Student	\$ -	\$ 2,000	\$ -	\$ 25,663	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 207	\$ 27,870
Subcontract	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Operating	\$ 604	\$ -	\$ 1,434	\$ 8,150	\$ 11,601	\$ -	\$ -	\$ 60,000	\$ 1,889	\$ -	\$ 83,658
Grand Total	\$ 144,240	\$ 118,489	\$ 243,877	\$ 490,526	\$ 129,920	\$ 10,519	\$ 16,623	\$ 48,792	\$ 2,151	\$ 252	\$ 1,254,789
Financial Notes - Items in Progress:											
\$ 10,718: THI researching & working with Grants Accounting to resolve A/R showing on projects 10030105 & 10030109											
\$ 12,895: THI waiting for reply from funders regarding unused funds; requested to be used to continue work; projects 10030107 & 10030102/10030103											

impact dashboard - march 2018

As of March, PSI averted an estimated 4.9 M DALYs, provided 3.8 M CYPs, and reached 4.2 M users globally.

- 2018 is starting off slowly and targets are likely to bring us in much lower than 2017 on all three impact and coverage metrics. This is counter to the ambitious SP targets.
- With the preliminary program targets, success would have us 26% lower for DALYs, 18% lower for CYPs, and 39% lower for users reached at the end of 2018 compared to 2017.
- Regionally, only LAC is ahead of 2017 performance at the end of Q1. Across health areas, only safe abortion and TB are ahead of 2017 performance at the end of Q1.
- Users reached will be included in 2018 impact reports to track progress toward the aim of reaching 90 million users globally across the five health areas from 2018-2020.

PSI PROGRESS ON HEALTH IMPACT

	March	2018 YTD	% Change from 2017 YTD	2018 Program Target*	% 2018 Program Target	2018-2020 SP Target	% 2018-2020 SP Target	Time Elapsed
DALYs Averted	1,549,927	4,880,311	-35%	23,107,013	21%	100,000,000	5%	8%
CYPs Provided	1,611,818	3,751,674	-29%	17,208,279	22%	75,000,000	5%	(3/36 months)
Users Reached [†]	1,470,950	4,194,681	-34%	16,608,909	25%	90,000,000	5%	

* The sum of clients who receive modern contraception, testing for HIV (among high risk), testing for malaria, NCD screening, or toilets from PSI.

PSI PROGRESS IN DALYS AVERTED, CYPs PROVIDED, AND USERS REACHED

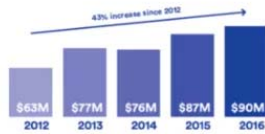


STRATEGIC DASHBOARDS

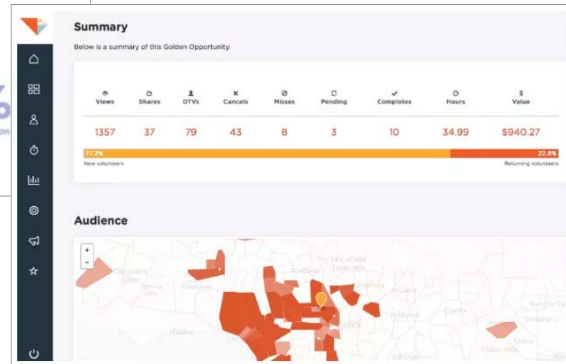
Financials

Since day one, **accountability, transparency and efficiency** have been core values of our Foundation. They will continue to drive our progress until we reach our ultimate goal of a cure, and close our doors.

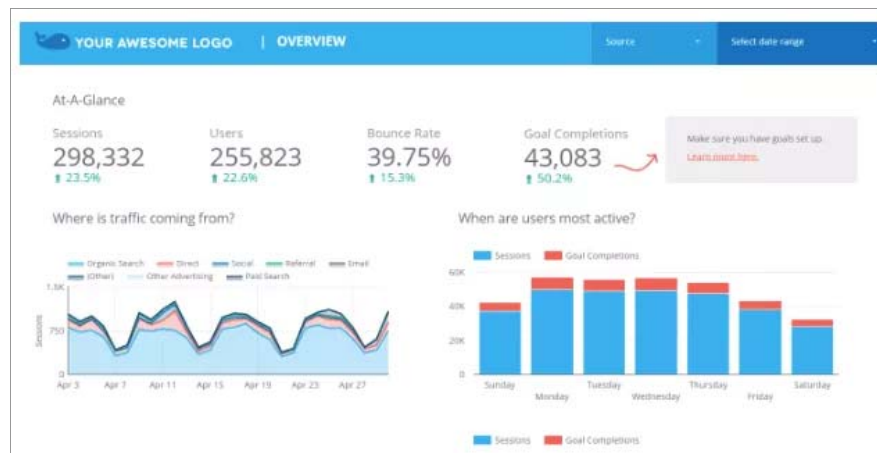
We can't do it alone, and we thank you for choosing to support our mission to speed a cure for Parkinson's.



89% Research Programs
8% Fundraising
3% Administration



OPERATIONAL DASHBOARDS

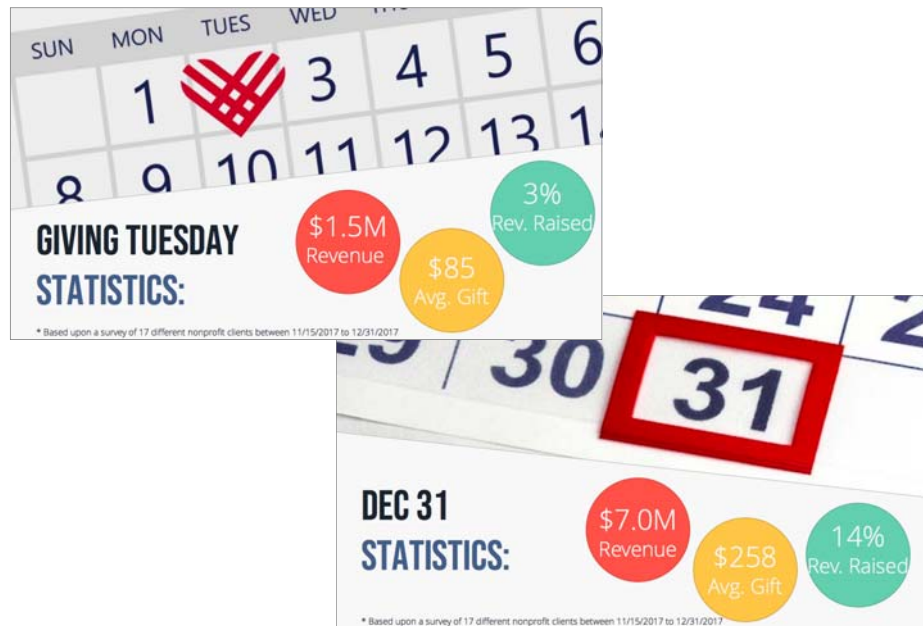


ANALYTICAL DASHBOARDS

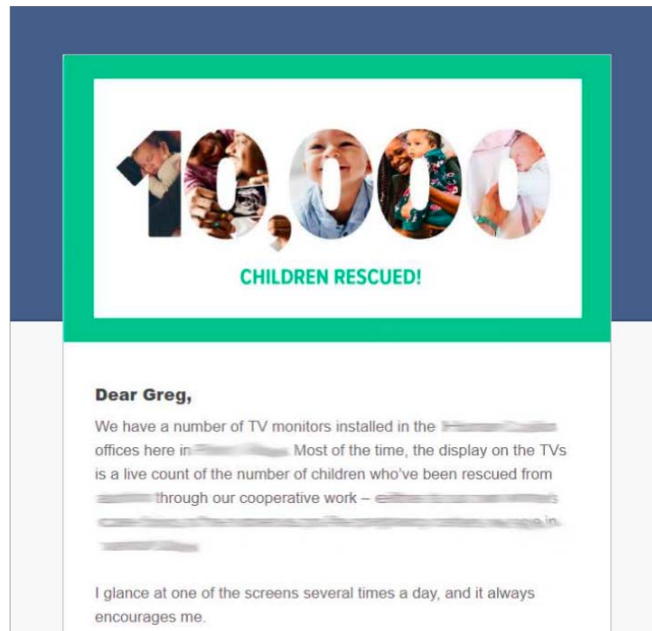
CONTEXT



CONTEXT



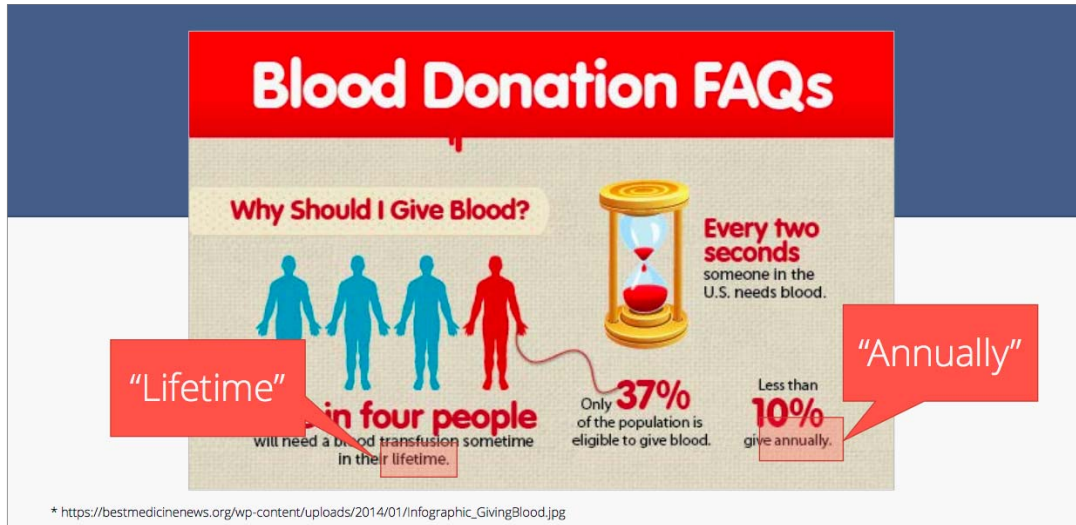
HONEST



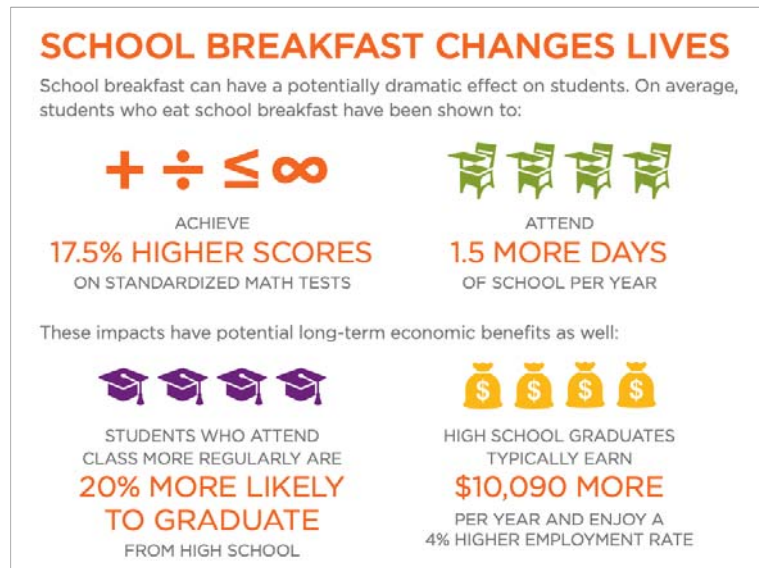
HONEST

NOT EXACTLY	BETTER
"...the number of children who were hungry declined to under half a million."	In 2015, 274,000 households with children experienced very low food security.
"...the USDA reports that millions of children go to bed hungry every night."	The USDA reports that millions of children were hungry at some time during the year.

HUMBLE



HUMBLE



Reinventing the Wheel

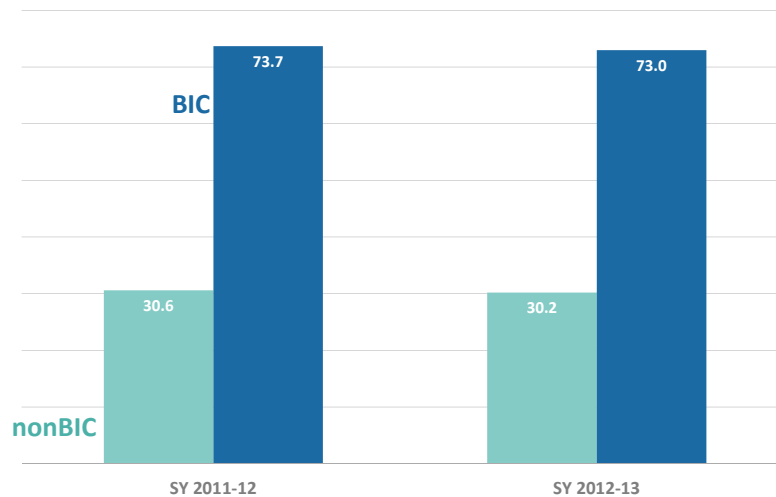
Apples and
Oranges

Getting Overwhelmed

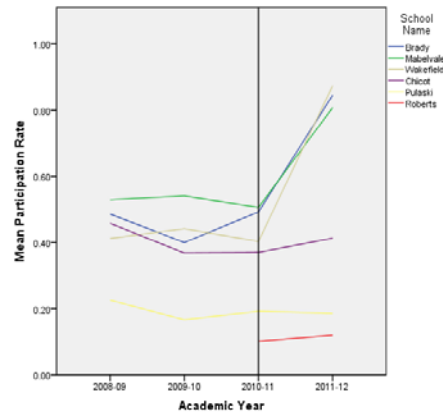
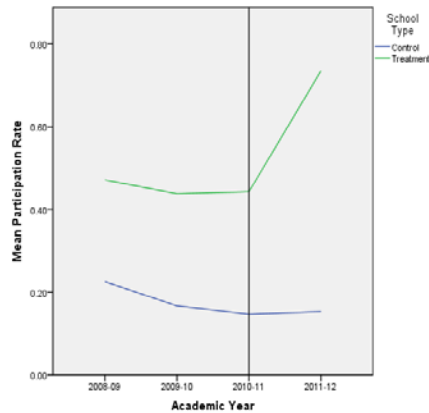
Expensive
Graphics

Common pitfalls

Breakfast participation rates were higher in BIC schools.



Breakfast Participation rates (2008-12)



Public vs. Private Nutrition Assistance

Over \$93
billion
in FY 2016

Public Spending

Less than
\$2 billion in
FY 2016

Private Spending

WEALTH OF INFORMATION



Thank You!

Kathy J. Krey, Ph.D.
 Director & Assistant Research Professor
 Kathy_Krey@baylor.edu

