

# A Small Nonprofit's Journey to High Performance

Facilitated and Prepared by:



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## **VISION**

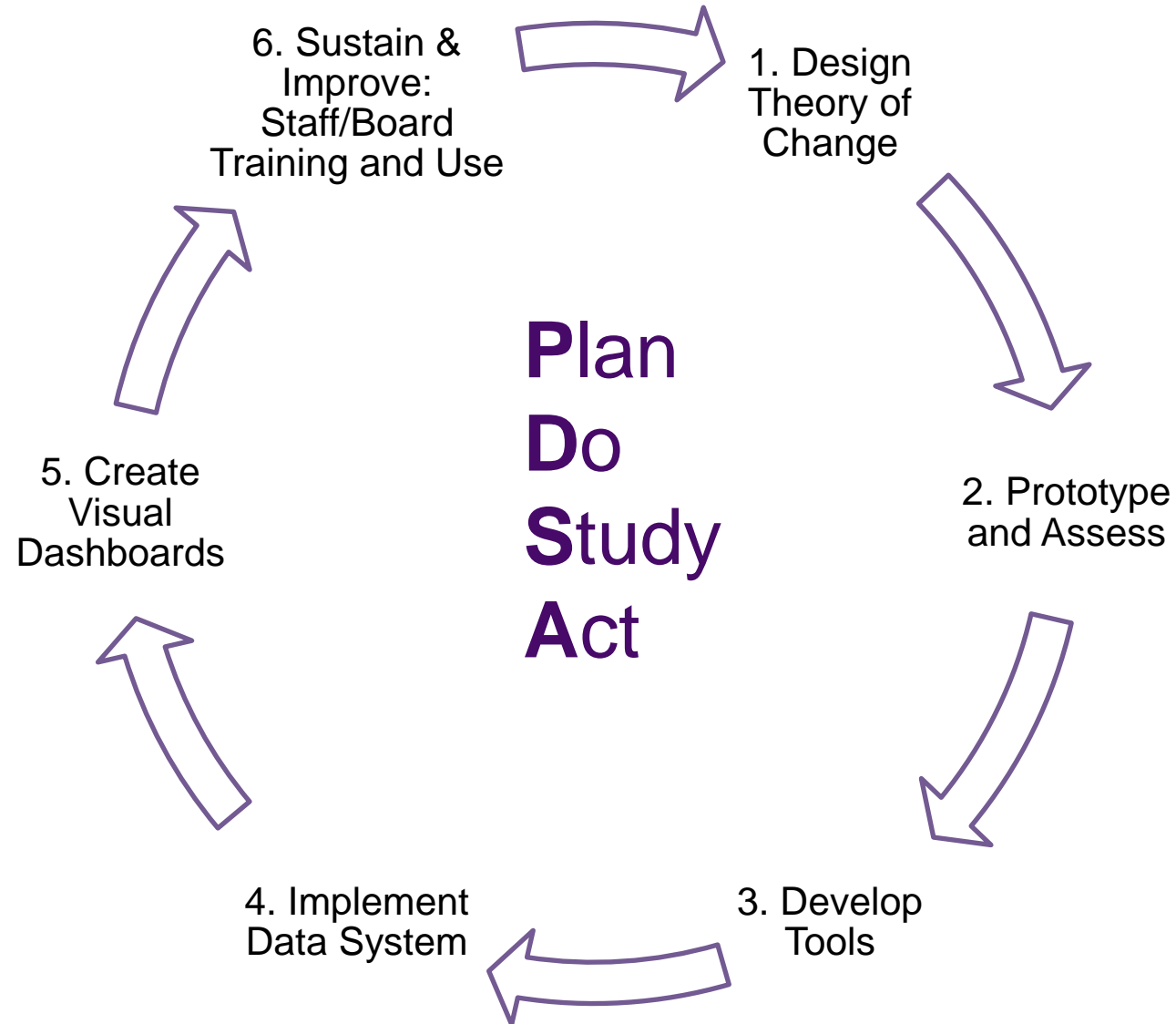
*SHALVA's vision is a strong and peaceful community, where every woman is safe in her home or relationship.*

## **MISSION**

*SHALVA supports Jewish women experiencing and healing from domestic abuse, through counseling, supportive services, and community education.*

# SHALVA's Process and Results

# Journey to High Performance



# SHALVA's Learning Goal through Data

SHALVA is shifting toward meaningful and real-time data, information, and knowledge.

The overarching goal of this effort is learning for continuous improvement.

SHALVA believes in high performance and believes that the journey will lead to helping more women, in more ways.

**We are focused more on meaningful data *use*  
from the resulting inputs and outcomes**

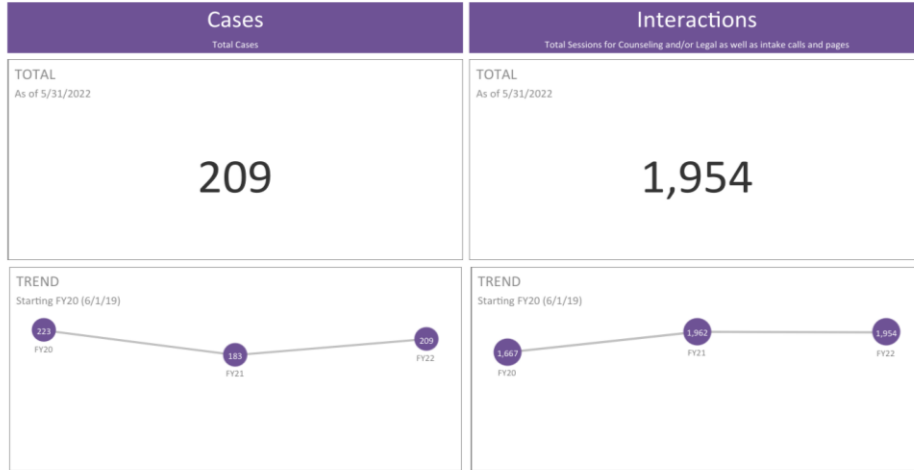
**and less on less meaningful data accumulation  
based on what might be *interesting*.**

# KPI Dashboard

## SHALVA OVERVIEW

BEHOLD. FULL SUPPORTED. FIND PLACE.

Data for current and past four fiscal years shown. Data prior to FY20 are not shown.



Charts reflect these filter selections: SELECT DIRECT CLIENT/THIRD PARTY: All, SELECT ONGOING/NEW: All, SELECT SERVICE TYPE: All (when "All" services include all intake calls and sessions), SELECT FISCAL YEAR: FY22, SELECT CALENDAR YEAR: All. Also,

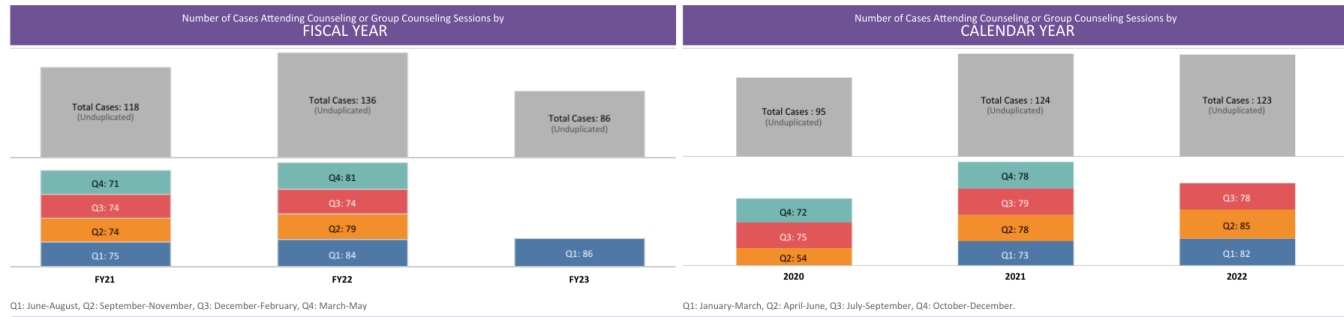
## SHALVA CLIENT TRENDS

Counseling or Group Counseling Sessions

Use filters to see results for subgroups. Scroll over bars to learn more. Data for current and past two fiscal years shown. Data prior to FY20 are not shown.

SELECT DIRECT CLIENTS/THIRD PARTY: All

SELECT NEW/ONGOING TO COUNSELING: All



Q1: June-August, Q2: September-November, Q3: December-February, Q4: March-May

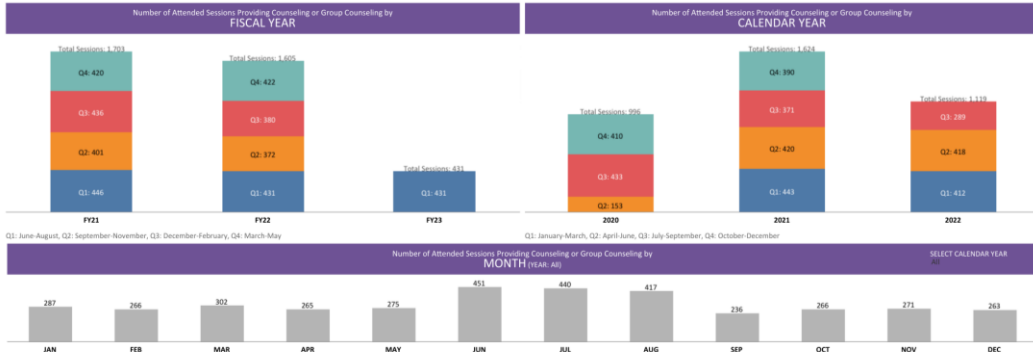
Q1: January-March, Q2: April-June, Q3: July-September, Q4: October-December.

## SHALVA SESSION TRENDS

Counseling or Group Counseling

Use filters to see results for subgroups. Scroll over bars to learn more. Data for current and past two fiscal years shown. Data prior to FY20 are not shown.

SELECT DIRECT CLIENT/THIRD PARTY: All



Q1: June-August, Q2: September-November, Q3: December-February, Q4: March-May

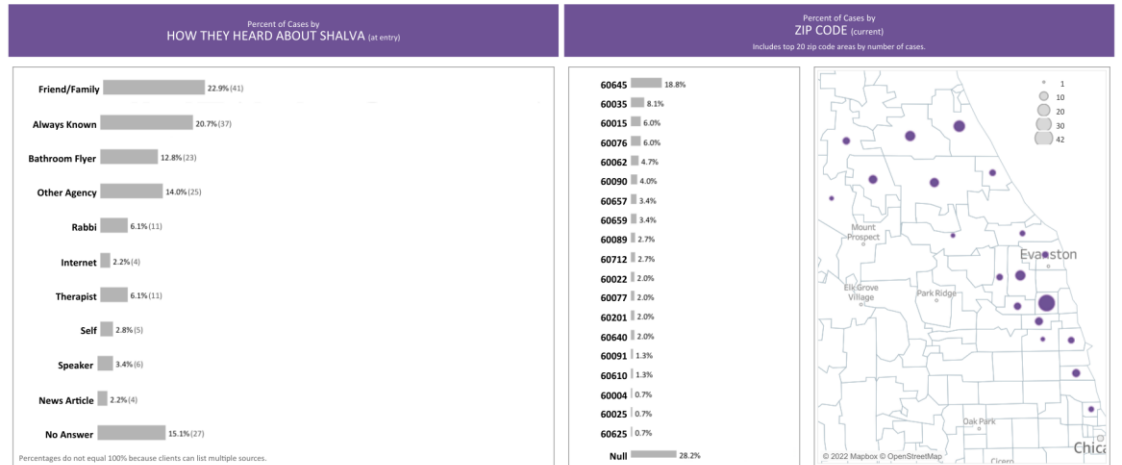
Q1: January-March, Q2: April-June, Q3: July-September, Q4: October-December

Charts show current year data as of 8/31/2022. Charts reflect these filter selections: SELECT DIRECT CLIENT/THIRD PARTY: All. Also, numbers reflect only service records with a meeting status of "Attended."

## SHALVA DEMOGRAPHICS

(Total Number of Cases: 179)

Data for current and past two fiscal years shown. Data prior to FY20 are not shown.



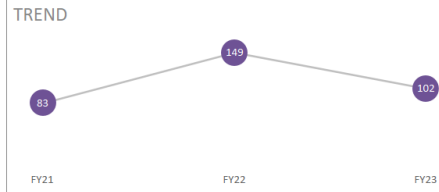
Percentages do not equal 100% because clients can list multiple sources.

# Community Education Dashboard

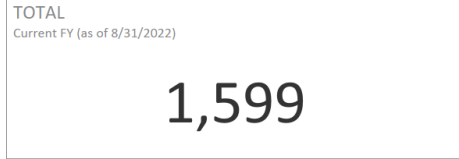
## SHALVA OVERVIEW

Data begins with FY21.

### Community Education Programs

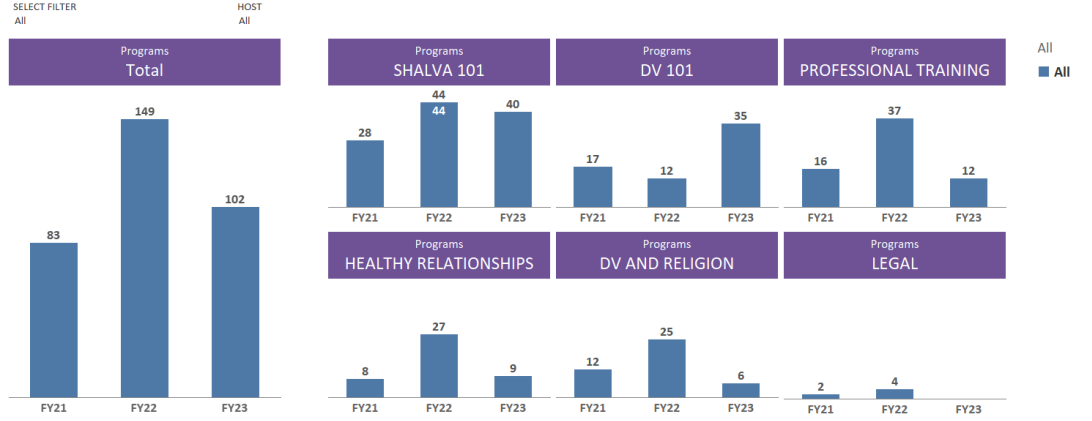


### Participants



## SHALVA PROGRAM TRENDS by Fiscal Year

Use filters to see results for subgroups. Scroll over bars to learn more. Data begins with FY21.



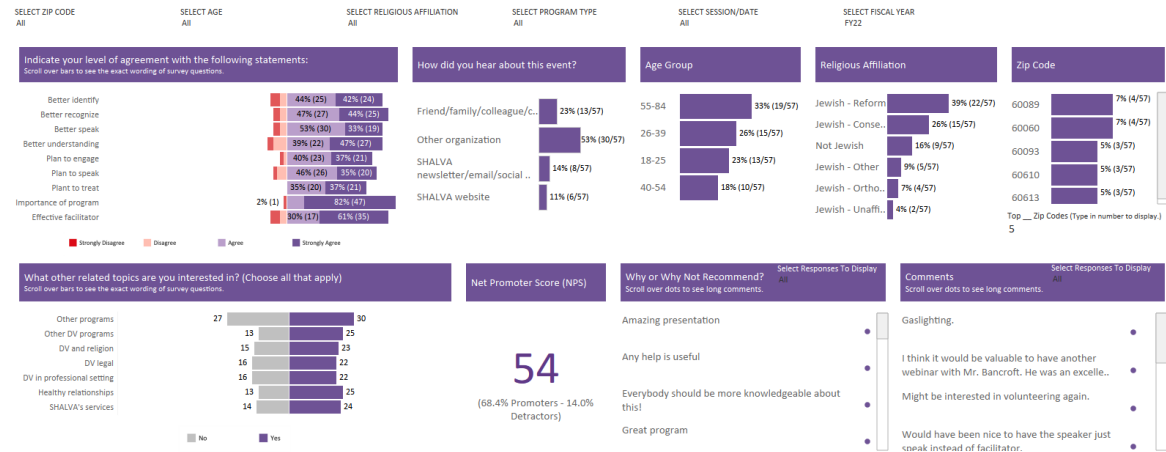
Charts reflect these filter selections: Host: All.



## SURVEY RESULTS

(57 surveys collected at 11 programs.)

Shows number of surveys indicating each response. Use filters to see results for subgroups. Scroll over bars to learn more. Data begins with FY21. Null or not applicable responses not shown.



# Clinical/Legal Survey Dashboard



## COUNSELING SURVEY OVERVIEW

Based on safety considerations of SHALVA's clients, some clients are not able to receive the survey online or via mail, so this survey data represents clients who were safe enough to receive and return survey responses. Data represents survey responses only and may include duplication in clients for different time periods. There is no duplication within a time period. Click on KPIs for more information.

Select Fiscal Year (FY starts June, FY22) | Select Distribution Date | All



### Satisfaction

Use filters to see results for subgroups. Scroll over bars to learn more. Chart labels indicate the number of surveys with valid responses to each question.

[Return to Homepage](#)

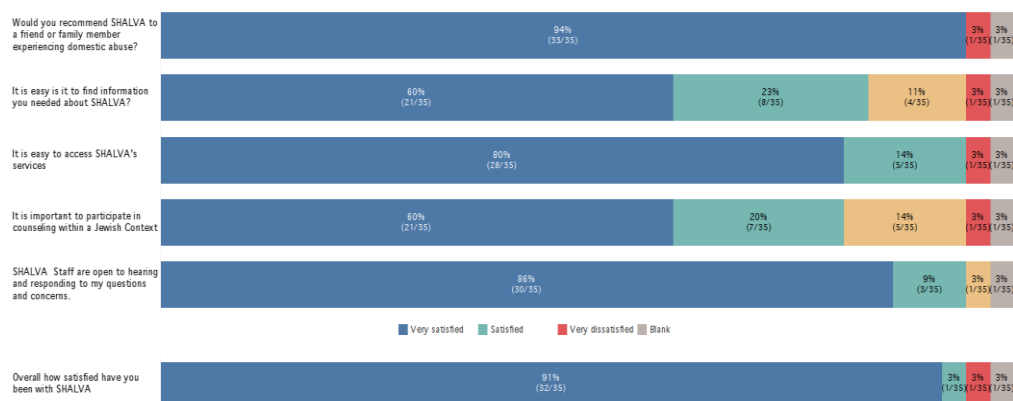
[See FY20 and Earlier Satisfaction](#)

Select Age: All | Select Religious Affiliation: All | Select Children Living With You: All | Select Frequency of Counseling: All | Select How Long at SHALVA: All | Select Fiscal Year: FY22 | Select Distribution Date: All

In the past 6 months have you experienced therapy in the following ways?  
 At Office: All | By Phone: All | By Video: All

NOTE: Questions about how client experienced therapy were included in FY23 survey and later.

#### Average agreement with the following statements



### Client Outcomes

Number of Responses: 35  
Items highlighted in PURPLE indicate key outcomes.

Use filters to see results for subgroups. Chart labels indicate the number of surveys with valid responses to each question.

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[See FY20 and Earlier Outcomes](#)

Filter	Value
Fiscal Year	FY22
Distribution Date	All
Age Group	All
Religious Affiliation	All
Children Living With You	All
Frequency of Counseling	All
How Long at SHALVA	All

Outcome	Percentage	Count
<b>Personal Goals</b> (Check one)		
I have not thought about or made personal goals yet.	5.7%	(2/35)
I have just set personal goals with my therapist.	2.9%	(1/35)
I am making progress toward my personal goals.	91.4%	(32/35)
<b>Enhanced Safety</b> (Check all that apply)		
My therapist discussed my safety with me	45.7%	(16/35)
My therapist helped me develop a safety plan.	25.7%	(9/35)
I have an enhanced feeling of safety since working with SHALVA.	77.1%	(27/35)
I am not concerned for my safety.	20.0%	(7/35)
<b>Increased Knowledge</b> (I have a clearer understanding since coming to SHALVA about:		
What is considered domestic abuse.	82.9%	(29/35)
Effects of domestic abuse on my life.	94.3%	(33 out of 35 surveys)
Effects of domestic abuse on my children.	62.9%	(22/35)
The options I have regarding my relationship.	74.3%	(26/35)
<b>Decreased Isolation</b> (Check all that apply)		
I have a clearer understanding of SHALVA services and support available to me.	68.6%	(24/35)
My therapist shared a resource/service outside of SHALVA with me.	60.0%	(21/35)
I feel less isolated and more connected, than before I started working with SHALVA.	74.3%	(26/35)
<b>Increased Coping Skills</b> (Check all that apply)		
I am learning how to reduce my stress and reactions.	74.3%	(26/35)
Based on my learning from SHALVA, I am more aware of my needs.	71.4%	(25/35)
I am using coping skills and techniques learned at SHALVA.	68.6%	(24/35)
I am better able to cope with my situation than before I started working with SHALVA.	88.6%	(31/35)
I have practiced self care in the past 3 months.	85.7%	(30/35)
<b>Confidence/Hope</b> (I feel better about myself, have more confidence, and/or feel hopeful since working with SHALVA. (Check one)		
No, I am not there yet.	5.7%	(2/35)
Yes, to some extent.	34.3%	(12/35)
Yes, to a great extent.	60.0%	(21/35)





# What We Learned

# What we've Learned – our “ahas” (Pitfalls to avoid along the journey to high performance)

## **Culture Change is Dynamic**

- Gain buy-in
- Harness clarity
- Know the potential and limitations
- Be bold
- Only capture data that you will use
- Keep staff informed
- Balance the needs
- Monitor and build in accountability

# What we've Learned – our “ahas”

(Pitfalls to avoid along the journey to high performance)

## **Technology/Tools are Complex and Dynamic**

- External guidance
- Learn to use software tools
- Understand process flow, mapping, and language/jargon
- Methodically test and track
- Know the implications of Survey choices and changes

# Self-Reflection and Small Group Discussion

# Self-Reflection and Small Group Discussion

## Culture Change

1. What is your organization's goal for CQI?
  - a. To what extent is your organization open to "learning" (versus maintaining the status quo)?
  - b. How can you balance the need for using data in real time for external users (funder-driven) vs using for internal learning (staff-driven)?
2. Do you have the leadership/staff to support your goal(s)?
  - a. Who are the internal champions that can help you identify use cases/gain clarity around purpose?
  - b. How might you collaborate across staff to effectively use data for decision-making?
  - c. What structure can you implement to keep staff informed about the process throughout, and to gain buy-in, trust and patience?

## Technology/Tools

1. Where are your technical strengths and where do you need additional training?
  - a. Theory-of-Change development
  - b. Client survey development
  - c. Excel, Salesforce, Tableau
  - d. Data visualization/dashboards
2. How are your project management skills?
  - a. Mapping fields from one system to another before duplicating (eg: from SurveyMonkey to Salesforce to data file in Tableau)
  - b. Anticipating the resulting data and using it to work backwards to hone forms (intake, surveys)
  - c. Data system implementation

# Harvesting the Learning

# Reflecting on the Journey to High Performance

## **Benefits**

Structure  
Automation  
Ease  
Clarity  
Learning  
Improvement

## **Culture of data use**

Staff engagement  
Board engagement  
CQI professional evolution  
Strategic decisions

## **Technology infrastructure**

Tools  
Thoughtful revisions

# Presenter Bios

## **Pamela Stern Braun, MSW, Clinical and Administrative Coordinator, [SHALVA](#)**

Pam has worked at SHALVA for 12 years. She was the case worker for SHALVA during its early years and returned to work at SHALVA after taking time off to raise her family. Prior to SHALVA, Pam worked for Chicago-based social service organizations including Keshet, Opportunity Inc. and the JCC's of Chicago.

Pam worked as the Intake Specialist for numerous years and her responsibilities have grown into areas of development and supervising intake staff. Over the past 6 years, Pam has been responsible for spearheading data collection, analysis and learning. She oversaw the shift from paper and Excel to a Salesforce data system and interactive dashboards. She manages all data processes and reporting, and she regularly presents meaningful data to staff, board and the community.

Pam holds a Master of Social Work degree from Loyola University.

## **Debra Brodsky Natenshon, MS, Founder and Chief Consultant, [DBN & Associates, L3C](#)**

Debra is an [influential social sector thought leader and respected expert](#) in organizational management. She guides clients on their “journey to high performance” as an adaptive consultant, trusted advisor, and culturally aware group facilitator. Debra successfully bridges strategy with practice-based evidence, resulting in [highly effective client engagements](#).

Through her social purpose consultancy, [DBN & Associates, L3C](#), Debra partners with motivated foundation and nonprofit leaders to advance their organizational and programmatic outcomes. Her core goal is defining social change based on verifiable results, rather than on well-intentioned activities.

For ten years prior to founding DBN & Associates, Debra served as CEO of a national nonprofit organization focused on outcome management. She published [ground-breaking research](#) with the Urban Institute, launched an eLearning course with Cisco Systems Foundation, and designed nonprofit and foundation effectiveness toolkits with support from the W.K. Kellogg Foundation.

Debra earned a Master of Science in Organizational Management in 2005.