



THE DEVELOPMENT OF
PERFORMANCE MEASURES AT
FORT YORK FOOD BANK

November 2008



Joseph L. Rotman School of Management
University of Toronto

Rotman NeXus Case 1

All rights reserved. No part of this case study may be reproduced, stored in a retrieval system or transmitted in any form by any means, electronic, mechanical, photocopying, recording or otherwise without the express permission of the Rotman School of Management.



THE DEVELOPMENT OF PERFORMANCE MEASURES AT FORT YORK FOOD BANK

THE FORT YORK FOOD BANK (FYFB) was founded in 1998 to serve an area in downtown Toronto, Canada previously served by the Daily Bread Food Bank (DBFB), which was moving its operations to the suburbs.

The FYFB has two objectives: (1) to provide basic food supplies to members of the community in need; and (2) to provide advocacy and counseling services to help people get “back on track.” To achieve these two objectives, FYFB developed a set of metrics which enabled the organization to measure its service usage and activities. It then built on this initial set of metrics to be able to measure impact. Metrics helped the organization plan, grow and change, ultimately generating further support from volunteers, partners and funders, as well as awards for its innovative work. This case study describes how FYFB developed their metrics, and outlines the lessons learned during the process.

BACKGROUND

FYFB'S OPERATIONS HAVE CONTINUOUSLY been run almost entirely by dedicated and involved volunteers. The organization was founded by Daily Bread Food Bank volunteers Adam Cook, Jim Ward, Devi Arasanayagam and Ravi Sreedharan, who became the President. Its operations are managed by a Steering Committee made up of its one staff member and volunteers, and overseen by an active and diverse Board, made up of corporate members as well as clients.

The Fort York Food Bank

The performance measures used at FYFB have evolved over the organization's history, for two reasons. First, its mission expanded, and so it introduced performance measures to reflect this expansion. The FYFB founders' experience at DBFB had taught them that if their ultimate goal was to reduce poverty, FYFB would eventually have to go beyond providing food bank services, to address the reasons underlying people's reliance on a food bank. Accordingly, in 2002, after four years of operation, FYFB was able to enhance its focus beyond feeding the hungry to "getting people back on track."

Second, the FYFB performance measures had to change to aid the organization in securing resources from the community. FYFB had a small amount of startup funding and food supplies from the DBFB, and as it grew, private donations became increasingly important for its success. Over time the organization secured support from the Trillium Foundation and the City of Toronto, as well fresh food supplies from Second Harvest. However, support from foundations and public institutions fluctuated, which made planning difficult. FYFB's management realized it needed to build a base of private financial and in-kind donors to achieve greater financial stability.

THE DEVELOPMENT OF METRICS: THE IMPLEMENTATION OF OUTPUT MEASURES

WHEN FYFB FIRST BEGAN OPERATIONS, it measured its activities to demonstrate to its donors and to itself that it was meeting its first goal of feeding the hungry: "If you can't measure it, how do you know it's happening?" The downtown catchment area served by FYFB was large and dispersed and it remained to be seen whether shifting operations from Lakeshore and Bathurst Streets to its new location at Bathurst and Dundas Streets would be a success. Specifically, it wanted to know if FYFB's new location was effective. It was clear that demand for food bank services was high within the large "catchment area" previously served by DBFB, with many low-income and immigrant residents, but it was unclear what the usage would be at the new

DEFINITIONS

Metrics

Measures; quantification

Input

The amount of resources committed to or consumed by a program
e.g. Cash donations received this week

Output

The direct products of program activities and operations, usually measured in terms of work accomplished or units produced
e.g. Total number of clients served this week

Outcomes

The benefits or changes of individuals or communities after participating in program activities; a measure of impact
e.g. Number of client referrals to community partners this month

Outcome measurement

A process for the ongoing monitoring of the results of an organization or program against agreed upon goals and objectives

-Adapted from Program Effectiveness Organizational Development - An implementation guide for agencies. September 2002 United Way of Greater Toronto.

The Fort York Food Bank

location. Also, DBFB was FYFB's main food supplier and required monthly reporting on the amount of food served and the number of people served. The FYFB implemented a simple data collection system that was easy for staff and volunteers to use. The system allowed them to compile operational reports and summaries that were useful for staff and Board meetings, as well as for writing applications, reporting to funders, and producing promotional material.

To develop this system, FYFB personnel started with DBFB's output metrics, with some additions (see Exhibit 1). Since FYFB staff wanted to gain a detailed understanding of their client base, they recorded whether a food bank user was an adult or child, and whether he/she was there for the first time. They knew from previous experience at the DBFB that tracking volunteer hours would be important to demonstrate to financial donors that their money was going directly to feeding people and not to paying salaries of workers, and so they recorded the number of volunteers they had and the number of volunteer hours put in.

These first metrics were immediately useful. First, they demonstrated that FYFB services were being accessed by large numbers of people in the new location. The metrics indicated that FYFB's usage was growing rapidly, and they provided a rough sense of who was accessing the food bank: in the first six months, they had 4,300 clients: 12% were new users and 20% were children.

Second, the metrics allowed FYFB to demonstrate need. Increasing numbers of clients meant an increased demand for food, and FYFB management realized that they would need to obtain more food donations. To demonstrate need to donors, they compared inputs, the amount of food donated, with outputs, the amount of food provided to clients. In doing so, FYFB defined the output metric of amount of food per client, which became a key unit for the food bank's activity. A low number unequivocally indicated that current levels of food donations were insufficient to meet demand and adequately relieve hunger.

Third, the metrics allowed FYFB to set its goals and to set targets for requests to donors. Based on their historical output and capacity, the organization's goal was to provide the equivalent of three days' worth

KEY LESSONS

Start simple

Start simple with output measures which are easy to collect and interpret

Experiment

Effective measures are often generated through experimentation. You may not get it right the first time, and you need to be prepared to change

Brainstorm with staff

Brainstorming with staff, Board members and volunteers involves them and can provide novel and practical ideas

Don't change an activity just to measure it

By measuring activities, you may be affecting them. This can result in unexpected negative consequences, and, if so, you need to make sure these do not outweigh the value of having the measure

Be client-centred

Be client-centred in selecting outcome measures. Choose them with the needs of your client base in mind.

Use proxy measures

Measuring an activity, even if by a proxy, is better than not measuring it, as long as the measure is precise.

The Fort York Food Bank

of food per client. This came to be known as a “Food Hamper” or “Food Basket”, which was later refined to conform to the Canada Food Guide daily nutrition standards. Operationally it meant that for a certain number of clients per week, they would require a specific amount of food, broken down by various food groups.

Once this goal was set, it could be used for planning purposes and for requesting donations. FYFB was then better able to communicate its needs to regular donors – such as the Daily Bread Food Bank and Second Harvest for food donations, and the City of Toronto and the Trillium Foundation– which resulted in increased donations and new funding. As well, it could better articulate one-time requests. For example, in 2007, FYFB requested a donation from the CHUM Christmas Wish Foundation and stated in their request, “We anticipate preparing approximately 412 hampers, for varying family sizes. The hampers will assist 721 individuals, of which 166 are expected to be children. We estimate a \$3.25 cost/person to prepare these hampers (\$2,343).” The request was clear and justified by the metrics, and FYFB received the amount requested.

THE DEVELOPMENT OF OUTCOME MEASURES

FYFB OBTAINED CITY OF TORONTO FUNDING IN 2001 through the Supporting Communities Partnership Initiative (SCPI) program and this enabled the food bank to focus on its second mission of getting people back on track. The goal was that eventually clients would no longer need FYFB’s services. Every client went through a short registration process upon his/her visit to FYFB, and this allowed FYFB to collect basic information, develop relationships and establish need. FYFB discovered that people were usually driven to seek its services because they were unemployed, on welfare or new to Canada, and had little income left over after rent to pay for food. Therefore, to get back on track they needed help in resolving issues related to housing, immigration, social benefits and employment. FYFB decided to address these issues by providing access to personal, legal and financial counseling, computers for job search, training, cooked meals and a

KEY SUCCESS FACTORS

Experienced volunteers

It is useful to have volunteers with specific skill sets relevant to performance measurement: accounting, strategic planning, and the delivery of operational programs.

Buy in from staff and volunteers

Staff and volunteers see the value of measures because they helped to develop them. “Metrics ensure that we are not misled by emotions and keep us grounded with respect to misconceptions we might have” - Program Coordinator Mike Schoonheydt

Easy to use data collection systems to ensure accurate, consistent data

The FYFB system features a user friendly software program to register incoming clients, templates to track food donations and volunteer hours; and a mechanism to count the number of plates before and after meals to measure meal program usage.

The Fort York Food Bank

sense of community through its Advocacy and Counseling Program, Drop-In Centre and Community Vitality programs.

FYFB staff and volunteers knew from conversations with clients and increasing service usage that FYFB was making a difference in their lives, and they wanted to be able to measure this difference. Providing evidence of their effectiveness in a clear and compelling manner would (1) provide insights as to how they might improve what they were doing; (2) demonstrate to funders demonstrate how their money was being used; and (3) indicate to current and potential stakeholders that the FYFB was an effective and worthwhile charity.

Staff and volunteers brainstormed about how they could measure impact. “Getting back on track” could mean many things, including increased health and well-being, having access to resources to find work, finding work and acquiring skills to increase employability. One possibility was to call clients at set periods after they registered at FYFB, to find out if they found work and were no longer using a food bank. However, FYFB staff decided that this was not feasible for logistical and privacy reasons: people moved, and more importantly, former food bank users often did not want to be bothered and reminded of their past. Even if they could track users over time, it was difficult to distinguish the contribution of FYFB from all the other resources and influences that might have contributed to a client’s wellbeing. Finding the perfect measure was not possible so the staff and volunteers at the FYFB focused on finding useful and feasible proxies. There were three key components of this process.

First, they experimented with several metrics, kept those that worked, and dropped those that did not. For example, they attempted to track computer usage – the number of clients that used the computer per day – which they thought should be a reasonable indicator of how much people used a computer for activities such as checking internet job sites, emailing and applying for jobs. However, this metric turned out to be both difficult to collect and imprecise: not every user remembered to sign up, one client might use the computer several times per day, and people used it for reasons other than job searches. A possible solution to this dilemma was to formalize the record-keeping around computer use and impose strict monitoring of the websites being accessed. However, FYFB personnel felt that maintaining unrestricted access to the computer was

THE ADVANTAGES OF MEASURES

Measures can demonstrate need

Measures convey need and help set targets, which provides clarity for the organization and funders

Measures can demonstrate priorities

Through the process of defining measures, you gain a better understanding of your client base and your priorities, so you can serve people more effectively and efficiently.

Measures can demonstrate results

Measures can identify your strengths, which can help in focusing your mission and telling your story in a compelling way to attract volunteers and donors

The Fort York Food Bank

more important than keeping perfect records. Instead, they looked for easily collectible indicators they could measure precisely through their formal registration process such as the number of clients that were accessing their Advocacy and Counseling services, the number of referrals they provided to resource institutions, and the number of third party interventions they participated in to help their clients deal with legal, employment or financial matters (see Exhibit 2). While not exact measures of impact, these were good proxy measures of clients' access and use of resources to help themselves get back on track

Second, FYFB became more client-centred, and implemented programs to understand and describe its clients, their needs and their experience of FYFB. FYFB had been collecting some basic information such as whether clients were adults or children, and first-time users, and they also had a Drop Box for client feedback, but this was not often used. In 2006, there was an initiative to find out more about the people using the FYFB's services, and how satisfied they were with them. With input from the Board, a clients' satisfaction survey was developed. The survey was administered after each client's arrival and registration at FYFB (see Exhibit 3). It was short and consisted of three parts: clients' experience of FYFB, clients' suggestions for improvement, and clients' demographic information. The multiple choice format provided more useful information than just qualitative feedback alone since it allowed for quantification of results and for linking responses. For example, while most clients were satisfied with current services, of those that were not at all comfortable at FYFB (3.6%), most were in the 26-35 age group, and did not like FYFB's appearance. These numbers signaled to FYFB that in order to attract young people, they had to improve the food bank's appearance.

Third, the food bank wanted to do a better job of illustrating its impact on its clients' welfare in order to attract the private donors needed for greater sustainability. In doing so, they had to go beyond simple numbers and link its measures to its clients' stories. In 2002, volunteers refined FYFB's then loosely articulated strategy using FYFB's metrics as a base for identifying FYFB's strengths. The results were the crystallization of FYFB's dual missions, redefined goals and vision, and a roadmap to achieve them. Importantly, through this planning process, FYFB also articulated a compelling story about its purpose and benefits: outcome measures were woven together with anecdotes about client experiences, and the result was very effective in showcasing the organization on its website and brochures.

THE BENEFITS OF MEASURES

THROUGH ITS FOCUS ON METRICS AND MEASUREMENT, FYFB has been able to optimize the delivery of its missions and build sustainability by attracting a diverse group of donors and volunteers. Metrics enabled FYFB to be client-responsive by evaluating where it could improve, what to continue doing, and where to focus resources effectively. Several examples illustrate these benefits. To make

The Fort York Food Bank

young people feel more comfortable at the food bank, FYFB management improved its appearance, by painting the walls a more cheerful colour and instituting an annual spring cleaning. Usage by Mandarin-speaking clients had increased (33%), and so FYFB recruited more Chinese volunteers and catered more to Chinese diets. After discovering that 36% of counseling requests were for advice with respect to welfare or unemployment insurance, FYFB ensured it had enough trained volunteer counselors to handle daily demand.

Metrics have greatly enhanced FYFB's credibility, transparency and reputation. The organization can tell its story more effectively by meshing client stories with measures, and these are showcased on its website, brochures and funding applications. This has allowed them to maintain support from DBFB, and to diversify its sources of funding to recurring private donations, which has stabilized its programming. It has enabled the FYFB to attract new community partners such as Ernst and Young, the Toronto Transit Commission, Chocolate Factory Lofts Community Association, Osgoode Hall Law School, and numerous local businesses. It has also attracted talented volunteers who believe that the food bank's metrics are an indicator of an effective management team and organization.

CONCLUSION

SINCE ITS INCEPTION, FYFB HAS ACTIVELY MEASURED ITS OUTPUT, and has increasingly tried to find ways to describe its impact. Measures have allowed FYFB to expand its funding by attracting private donors, since numbers demonstrate need and corroborate stories that appeal to individual donors. Measures have also been the basis for FYFB's strategic planning process which enabled it to focus and optimize its impact, and become more client-focused and responsive. This, in turn, has enabled FYFB to obtain funding and support from a range of sources so it could serve more food, advise more clients and provide the help that they needed most. In addition, FYFB's work has brought recognition from third parties: its work has been recognized with the Ernst and Young Community Excellence Award and a Bealight Foundation Fellowship. A testament to FYFB's effectiveness is that many volunteers were once clients themselves and want to give back and be part of the FYFB impact.

Exhibit 1
 FYFB Operations Report
 First Year Ending Mar 31, 1999

	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March	D (Totals)	(Average)	TD (%s)
Hampers Served:	345	365	379	395	432	391	393	326	307	372	333	368	4,406	367.17	
Number of Adult Food Bank Users:	452	486	484	466	547	506	485	416	401	479	444	491	5,657	471.42	78.83%
Number of Child Food Bank Users:	129	117	150	111	134	108	128	118	114	135	117	158	1,519	126.58	21.17%
Total Food Bank Users:	581	603	634	577	681	614	613	534	515	614	561	649	7,176	598.00	100.00%
Number of 'First Time' Food Bank Us	84	104	87	62	90	79	59	71	36	62	54	93	881	73.42	12.28%
Number of Volunteers:	17	18	16	16	18	16	20	17	17	16	16	15	202	16.83	
Volunteer Hours:	405.00	432.75	520.00	467.00	538.00	524.00	501.00	422.75	387.50	484.00	388.75	522.75	5,593.50	466.13	
Number of Advocacy Service Users:											43	30	73	36.50	
Number of 'Drop-In' Centre Users:							68	65	63	80	60	65	401	66.83	100.00%
Number of 'First Time' Drop-In Centre Users:							33	11	10	14	8	4	80	13.33	19.95%
Number of Donors Approached:							12	10	3	2	2	2	31	5.17	
Cash Donations Received:							\$50	\$5	\$755	\$50	0	0	\$860	143.33	
Food Donations Received:							\$1,839	\$1,415	\$3,299	\$2,223	\$1,675	\$4,932	\$15,383	2,563.75	

Exhibit 2

Advocacy and Counseling Report

Twelve Months ending July 31, 2008	2007												2008		Past 12 months
	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Total	Aver	
Outreach Meetings	4	2	1	0	0	2	0	2	0	1	6	6	24	2	
Referrals to Partners	11	10	7	8	4	6	9	17	3	9	6	8	98	8	
Community Partners	9	7	8	9	9	9	11	11	11	11	11	11	117	10	
Community Partner Retention	100%	78%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	-	98%	
Counselling Service Users	173	110	101	78	41	75	63	96	63	95	80	92	1,067	89	
3rd Party Intervention - Meetings	3	4	1	2	0	2	1	2	1	3	8	9	36	3	
3rd Party Intervention - Letters/Appl	9	6	5	6	4	6	8	23	18	3	6	3	97	8	
Cross-Cultural Language Services	28	30	26	17	15	17	20	16	16	40	23	30	278	23	
Languages Supported	6	6	6	6	6	6	6	6	6	6	6	6	72	6	
Workshop Partners	7	6	7	7	7	8	7	7	7	7	7	7	84	7	
Workshops Delivered	8	1	2	0	0	2	4	1	2	2	1	1	24	2	
Workshop Attendance	13	18	12	0	0	16	10	12	25	23	8	8	145	12	
Counsellors	11	9	9	10	10	10	10	11	11	10	11	9	121	10	
Counsellor Retention	100%	82%	100%	100%	100%	100%	100%	100%	100%	91%	100%	82%	-	96%	
Senior Volunteers	9	7	7	7	7	7	6	7	7	7	7	7	85	7	
Senior Volunteer Hours	446	333	279	439	333	390	402	320	400	502	390	474	4,706	392	
New General Volunteers - Trained	2	2	2	5	2	6	4	4	5	6	2	1	41	3	
Volunteer Hours	184	249	263	272	260	368	426	347	383	465	449	415	4,081	340	
Case BreakDown															
Housing	23	19	9	6	2	9	5	2	0	9	3	9	14%		
Legal clinic/ID	14	6	4	7	5	8	4	2	2	4	6	2	9%		
OW/ODSP/EI	48	23	22	20	14	22	21	10	13	25	24	30	39%		
Training/Employment	8	5	1	14	0	3	2	13	7	6	7	3	10%		
Financial (Tax Returns, CTB, etc.)	0	2	0	0	0	3	1	12	12	1	3	2	5%		
Health	12	5	3	1	0	0	1	4	3	2	7	3	6%		
Immigration	10	2	4	1	1	3	0	1	2	1	1	1	4%		
Other	33	20	8	3	4	1	1	6	1	3	4	1	12%		
Total	148	82	51	52	26	49	35	50	40	51	55	51			

Exhibit 3

Sample questions from FYFB Client Satisfaction Survey 2008

What do you think of the Fort York Food Bank's appearance? Please check all that apply.

	Yes	No	No Opinion
I find the appearance to be appealing/pleasant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I find the Fort York Food Bank to be clean	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I find the Fort York Food Bank to be well organized	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you answered "No" to any of the above, please explain why (in the space below) to help us improve. Thank you.

How comfortable are you while you are at the Fort York Food Bank?

- I am very comfortable
- I am somewhat comfortable
- I am not comfortable at all

Please tell us (below) how we can make you more comfortable while you are in the Fort York Food Bank.

How do you feel that staff/volunteers treat you while you are at the Fort York Food Bank? Check all that apply.

	Yes	No	No Opinion
I am treated with dignity and respect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am treated with courtesy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff/volunteers listen to my concerns and questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am satisfied with the way my concerns and questions are addressed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you answered "No" to any of the above, please explain why (in the space below) so we can serve you better. Thank you.



About Rotman NeXus

Linking Business Minds and Social Missions

Rotman NeXus is a non-profit management consulting service established to help non-profit organizations and social enterprises build capacity, explore new revenue streams, and broaden their networks for financial and community support.

www.rotman.utoronto/nexus

Contact Us

Phone: 416-946-3474

Email: nexus@rotman.utoronto.ca

Mailing Address:

Rotman NeXus
Joseph L. Rotman School of Management
105 St. George St.
Toronto ON
Canada M5S 3E6

Acknowledgements: Rotman NeXus would like to thank everyone at The Fort York Food Bank who participated in the development of this case study for their time and insights. We are sure that your story will be valuable in stimulating more discussion about the effective use of performance measures in the non-profit sector in Canada. Thanks also to the Social Sciences & Humanities Research Council of Canada for funding the development of this case study and to Sara Sarkar for researching it.