"Design of an Evaluation Framework for Place-Based Initiatives— Southern Bancorp Case Study"

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Ben Kaufman is social metrics manager at Southern Bancorp Community Partners. He is responsible for the comprehensive evaluation of Southern's place-based model of community development. He has developed an evaluation model that measures program performance as well as community level improvement. He analyzes the causes of poverty, unemployment, and low educational attainment in target communities and identifies measurable factors. He is responsible for evaluating programming and projects to determine alignment and efficiencies in meeting transformational goals. Prior to his work at Southern, he developed an evaluation and measurement framework for The Timberland Company to determine impact in worker programs throughout the company's international supply chain. Kaufman also worked with TOMS shoes in Ethiopia to develop the supply chain for donations; he developed a measurement and reporting framework for the local partner organizations. Kaufman has over six years of nonprofit management experience. He holds a master's in public service from the Clinton School of Public Service in Little Rock, Arkansas, and a bachelor's degree in anthropology and sociology from Drake University in Des Moines, Iowa.

Summary and Findings: Southern Bancorp Community Partners initiated a social metrics program designed to develop the systems and procedures to define, measure, and optimize the collective impact of all Southern's entities in target communities. These communities currently include Clark, Mississippi, and Phillips County in Arkansas and Coahoma County in Mississippi. Southern's activities include traditional lending, asset building, workforce development, traditional community development, and policy initiatives. The task for the framework was to evaluate not only the individual initiatives and programs, but the aggregate impact of Southern's work at the macro level. A theory of change methodology was developed and applied. Numerous logic models were designed and synchronized to create a unified development model that was measurable. The program utilizes both community and program level evaluation. This project sought to develop and ingrain a culture focused on tangible social impact within Southern, including a comprehensive feedback mechanism that permits continual refinement of Southern's strategies and programs, to facilitate maximum community development.

Implications for Policy and Practice: Establishing a comprehensive evaluation framework is not an easy task, as it requires the entire organization to buy in for successful implementation. Setting benchmarks for success provides a lot of positives, but it also fosters difficult conversations. Defining success means that strategy will be driven by the results of determined data and an understanding of the risks or roadblocks that are preventing the achievement of the goals. These definitions of success may mean challenging/not funding/discontinuing good programs because they do not suit those definitions. Evaluation fosters an environment of accountability. Understanding if a program is successful or not allows for strategic decision making on which programs should be continued, modified, brought to scale, or discontinued. These processes allow for the determination of which programs are giving the biggest return on investment. The methodology used in this case study is applicable to any entity and in any geographic space. The process by which the theory of change is established and the discussion to determine indicators are developed through conversations with staff and stakeholders. The process allows any organization to develop a measurement framework that facilitates more efficient and effective programming.