



**Intentionally Causing Positive Change:
Converting Data to Intelligence**



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Grade Level Reading: Driving With Data...Where Are We?

- ✓ Step 1: We have Articulated Our Theory Of Change
- ✓ Step 2: We have Identified Key Partners
- ✓ Step 3: We have Established our MOU's and Data Sharing Agreements
- ✓ Step 4: We have Developed a Community of Practice

- ✓ What's Next? *Measure Outcomes and Manage Performance!*
 - ✓ Implement program model as designed
 - ✓ Ensure adoption and the right "dosage" data is being collected, at the participant level
 - ✓ Track relevant KPIs (Key Performance Indicators) and Outcomes, with realistic milestones (*celebrate these!*)
 - ✓ Correlate efforts to outcomes
 - ✓ Adjust programming to improve service delivery

Compassion Through Effectiveness

"There's a lot of belief that measurement takes away from thinking about your clients, when in fact I think it is the very thing that demonstrates the level of respect you have for them."

- Anisha Chablani, Chief Knowledge Officer, Roca

What is Performance Management?

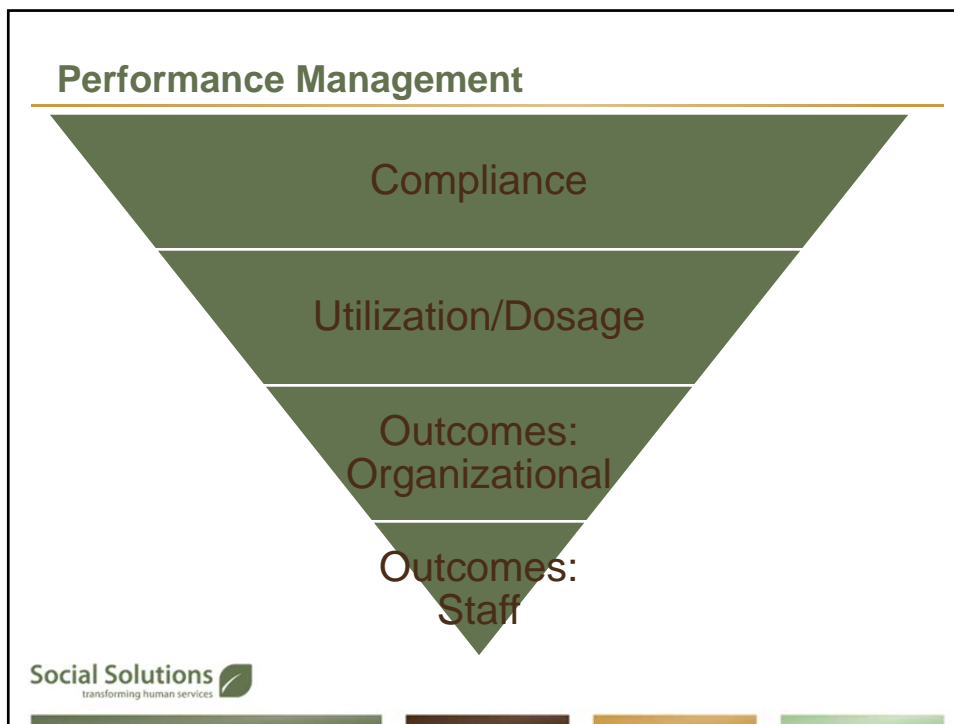
**Active
Monitoring
of Data**

**Understanding
what is and is
not working**

The goal is to optimize
your chances for
achieving outcomes

**Continuing
to improve
(ongoing
process)**

**Making ongoing
adjustments as
needed**



Ensuring Adoption and Implementation Fidelity Measuring Program Dosage

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Ensuring Adoption

- Data should be monitored daily/weekly initially, and then at a minimum monthly.
- The key is NOT to wait until the end of the year.
- If results are not what we expect...is it:
 - A training issue?
 - Adoption/culture issue?
 - Process issue?
 - Data Monitoring/accountability issue?
 - A program delivery issue?



The Journey of 1,000 Miles...

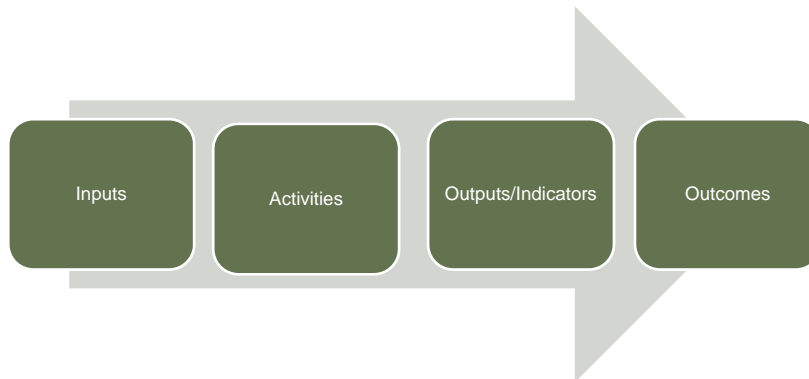
- Fidelity to implementation
 - May require changes to processes just to reach initial dosage (as per theory of change/program model)
- Ensuring fidelity to your program model entails:
 - Reaching your target population
 - Delivering the right types of services to the right participants
 - Delivering the right dosage of services to the right participants (frequency of services, amount of services, duration of program participation)
 - Ensuring quality of services

All of this will be defined in your Theory of Change.



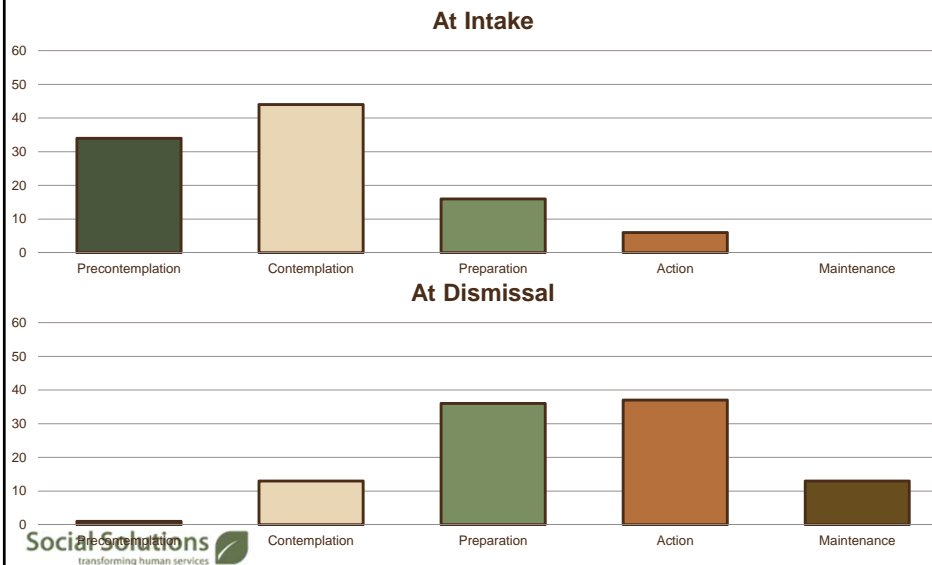
✓ Theory of Change or Logic Model

- The difference you want to make. How you plan to get it done.



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Center for Violence Free Relationships Stages of Change Model



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Case Management Reports

Center for Violence Free Relationships

Staff Initials	# on caseload	SA	DV	Both SA & DV	# of Sessions	# of Intakes	# of No Shows	Hours for SoC progress	# of sessions for a client	Most frequent SoC
MB	15	10%	78%	12%	7	2	1	2.2	6	2
BF*	25	7%	92%	1%	49	10	12	2.7	10	3
BG	15	4%	78%	18%	28	7	9	4.6	10	4
PG*	24	8%	92%	0%	38	4	10	6.6	16	5
CL	5	14%	86%	0%	14	2	1	1.6	12	4
EM*	15	8%	67%	25%	6	3	1	1.0	5	1
FM	2	33%	50%	17%	5	0	0	5.5	6	5
MW	2	4%	67%	29%	8	7	0	0.9	2	4

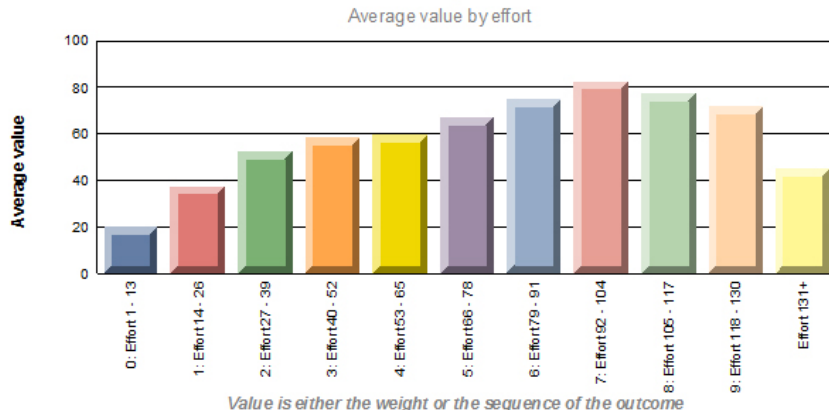
Measure Programs in Terms of “Dosage”

From Fidelity to Impact...

- What’s Working for Whom & Why?
 - Analyze improvements evidenced in Assessment data
 - Service-level data tracking and management
 - Analyze Dosage first in terms of fidelity to program model, then as it contributes to Outcome Achievement
 - Frequency
 - Duration
 - Cohort
 - (for Outcomes Achievement: re-evaluate Service Type and Program Model)

More Does Not Always Mean Better

Outcome Value by Effort Interval



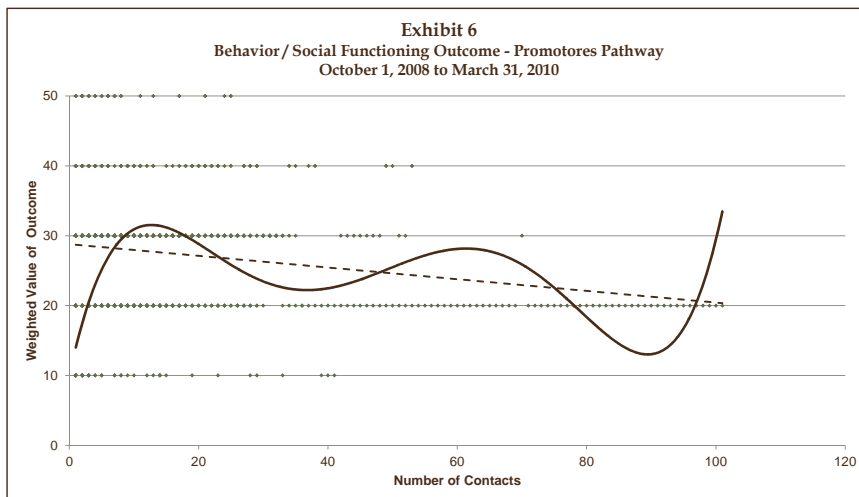
- In this scenario, approximately 100 interactions (efforts) is optimal.

Promotor Pathway Program

- Launched in 2008
- Intensive client management for youth who face the greatest life challenges.
- Help disconnected youth:
 - Make a successful transition to adulthood
 - Reconnect them to family/community
- Common issues include:
 - Homelessness
 - Substance Abuse
 - Mental health issues
 - Criminal Justice Involvement



Non-linear Regression (Curved Line)



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N = 58 Youth

47% improved, 17% no change, 36% regressed

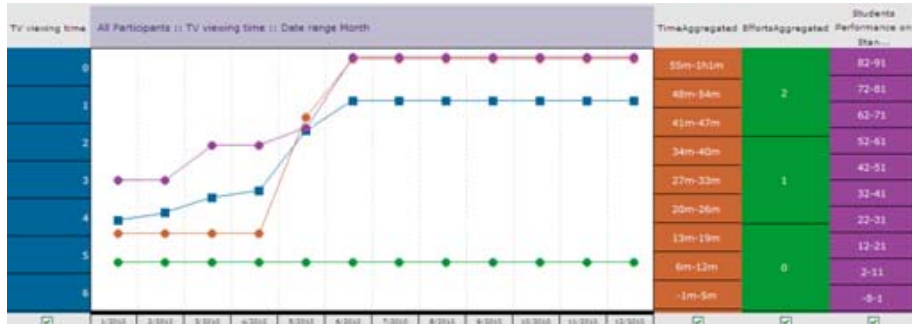
Important Measurement Considerations (cont.)

- Do you collect and analyze data on types of services?
 - Some program models are more effective at helping certain participants achieve desired outcomes.
 - Group vs. Individual
 - High-performing organizations are able to determine which services are most appropriate and effective for which sub-populations within their total service population.
 - Do not waste your limited staff and financial resources on demonstrably ineffective efforts!
 - Or worse...not just ineffective but harmful.
 - LAYC Domestic Violence sessions

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What About Our Services Are Most Impactful?



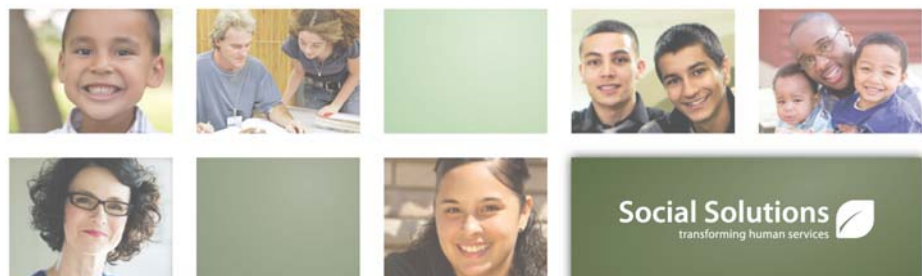
- There is a correlation between time spent with students (orange) and student performance (purple). Also inversely between time spent watching TV (blue, inverted) and student performance.



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Correlating Efforts to Outcomes and Key Performance Indicators



✓ **Example of Best Practice: PerformWell**

What does your program do?

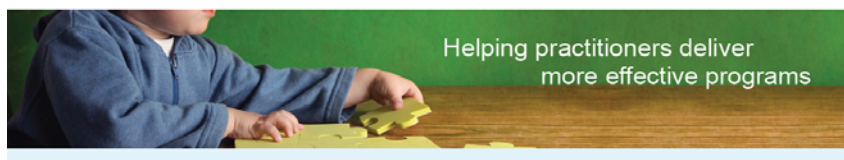
- Educational advancement

How will you demonstrate if you are meeting outcomes?

- Quarterly report card
- Classroom engagement, work habits
- Placement upon promotion to middle school

How do you choose assessment tools?

- PerformWell descriptions can help you decide



The PerformWell Difference

A FREE, ONLINE RESOURCE, PERFORMWELL PROVIDES PRACTICAL KNOWLEDGE AND TOOLS THAT HUMAN SERVICE PROFESSIONALS CAN USE TO MANAGE THE EFFECTIVENESS OF THEIR PROGRAMS.

IT IS A COLLABORATION BETWEEN **URBAN INSTITUTE, CHILD TRENDS & SOCIAL SOLUTIONS.**



Outcomes, Indicators and Services, Oh My...

- Outcome – What you are trying to achieve
 - This can be captured as an assessment value or Point of Service Value.
- Indicator – What we use to stay on course
 - Captured typically as a Point of Service that demonstrated incremental progress towards an indicator that is related to an outcome.
- Output/Service – What we count
 - The activities and services you provide to hopefully achieve your intended outcome.

Gathering Data to Support Your Logic Model

- How do you measure progress (outcomes and indicators)?
 - “# students served” doesn’t tell you anything about how effective your programs are
 - It’s not about accountability; it’s about being as intentional as possible in your decision-making
- Do staff members track their work with participants at the point of service?
 - You must aggregate progress from data collected at the individual level, or reports will not accurately represent how effectively you are serving your target population
 - Strategy is informed by reliable data that correlates efforts with outcomes

Example – Outcome, Indicator, Service/Output

- Track Progress Towards Grade Level Reading
 - Not at all on track
 - Somewhat on track ← **Indicator**
 - On track

- Track Grade Level Reading Session
 - Yes/No ← **Service/Output**

- Grade Level Reading Status
 - Achieved 3rd Grade Level Reading ← **Outcome**
 - Did Not Achieve GLR

Managing to Outcomes Should Occur at All Levels

- Staff monitor individual participant performance
 - Staff have to feel invested
 - Staff have to find value
 - Process should be thought provoking

Create Intentionality at the Point of Service

Point of Service Information

Participant: Godfree, Gail
 Point of Service / Activity: Track Service Disposition
 * Contact Location / Method: --Select Location / Method--
 Date of Last Contact: None
 * Date of Contact: 1/12/2011
 Date of Next Contact:

Track Service Disposition

* Time Spent:
 * Value: --Select--

Track Service Disposition Note

Notes:

Unable to Assist
 Provided I&R - no follow-up needed
 Provided I&R - Follow-up requested
 Provided Counseling
 Provided Safety Planning
 Provided Referrals

> Save Effort & Close Save Eff



Tracking Outcomes - Intentionality

Point of Service Information

Participant: Macaphee, Ellie
 Point of Service / Activity: Develop a Relationship for Action
 * Contact Location / Method: --Select Location / Method--
 Date of Last Contact: Recorded on 12/23/2009 12:42:30 PM Central Standard Time
 * Date of Contact: 1/12/2011
 Date of Next Contact:

Develop a Relationship for Action

* Time Spent: 0
 * Value: Relationship is progressing

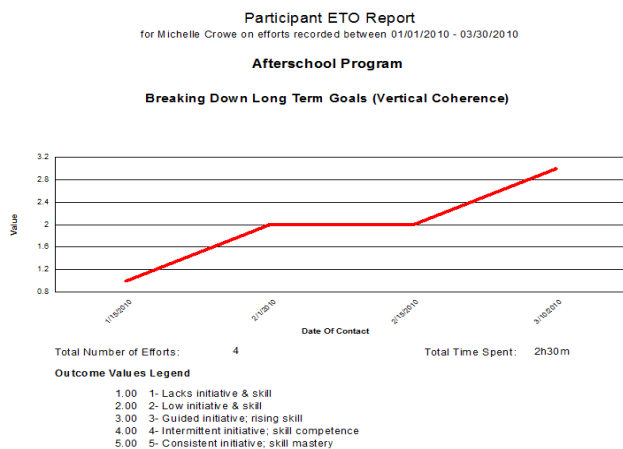
Add POS Element

Participant not interested in services/support recorded for 12/7/2009.
 Participant neutral/ non trusting
 Relationship is progressing
 Strong relationship developed/ trust in place
 Participant is active in relationship



Performance Management Occurs at Every Level: STAFF

- Do they have access to data to make meaningful decisions about their work with clients?

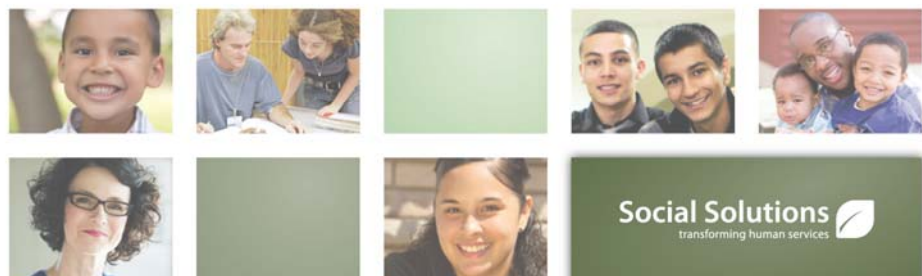


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Performance Management:

Adjusting Programming to Improve Service Delivery



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Intelligence = Being Able to Learn & Improve

▪ Data vs. Intelligence

- **Data** may be able to tell you whether things are improving or not (e.g. 100 graduates vs. 89), but it can't tell you why
- **Intelligence** empowers you to re-allocate resources, modify processes and generally be more intentional in adjusting programming to improve service delivery (e.g. *more graduates resulted from greater proficiency in reading, so more attention to reading proficiency will likely increase graduation rates*)

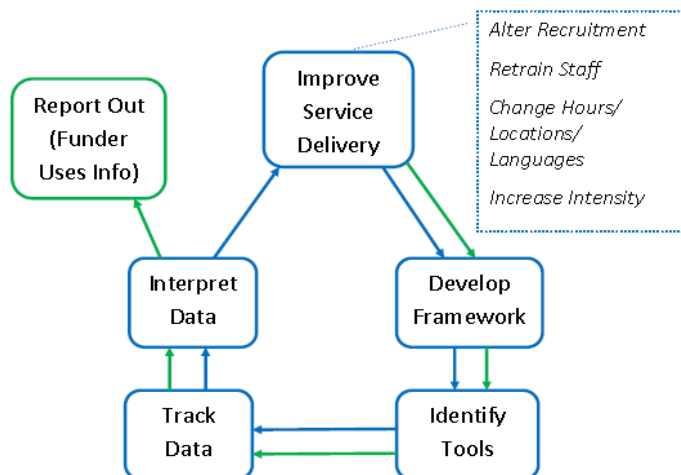
Performance Management – What it looks like

- **Sample Finding #1: Halfway through program, notice that program attendance is low among highest risk group.**
 - Action: Reach out to teachers to encourage highest-risk youth to attend tutoring.
 - Action: Have separate one-to-one discussions with highest-risk youth to encourage attendance.
- **Sample Finding #2: Math grades increased, but reading grades did not change.**
 - Action: Investigate why this may be occurring.
 - New finding: Tutors unfamiliar with reading curriculum used in school – so tutoring not effective.
 - Action: Train tutors in reading curriculum before start of next academic year.

Managing to Outcomes Should Occur at All Levels

- Executives manage to outcomes at the program/organizational level
- Program Managers monitor staff caseloads/program level
- Staff monitor individual participant performance

Performance Management is an Ongoing Process



Common misconceptions

- We track a lot of data, does that make us a performance driven organization?
 - *Do the staff and leadership have access to that data?*
 - *Do they use that data to drive their decisions?*
 - *Do you and your staff know why you are tracking the information?*
- We would love to monitor the effectiveness of certain staff because we suspect they aren't doing their jobs well.
 - *Nonprofits folks don't come to their jobs for the pay.*
 - *This should not be a punitive process.*
 - *The idea is to focus on WHAT WORKS and replicate it.*
- We just went through a strategic planning process and implemented many changes based on the data, are we performance driven?
 - *This is not a one shot deal. This should be daily, weekly, monthly...monitoring...*

How do you know if you are on track?

1. Are we using it?
 - How do we know if staff are using it? Is there visibility at all levels?
2. Is it set up to track what we value?
 - Utilization or Impact?
 - Do we have something to benchmark or measure progress against?
3. Our Measures, do they:
 - Allow staff to feel invested?
 - Provide value to staff?
 - Provide a thought provoking process?
4. Who in the agency/community is looking at results?
 - So what? Why? How? What if?
 - If no one, how are decisions being made?



Thoughts/Questions:

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