Supporting Adaptive Learning & Shared Measurement

Matt Schubert
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Social Solutions

60,000+ Users; 15,000+ Programs, ~500,000 job placements

The Leaders in Performance Management

An Experienced Human Service Team

A Proven Nationally Deployed Platform for Human Services

Affiliations

Connected Health and Human Services

Microsoft GOLD CERTIFIED Partner

Founders

ALLIANCE FOR EFFECTIVE SOCIAL INVESTING

PerformWell

Social Solutions transforming human services
Collective Impact Quick Review
FSG Slide Deck
There Are Several Types of Problems

Simple

Baking a Cake

Complicated

Sending a Rocket to the Moon

Complex

Raising a Child

The social sector often treats problems as simple or complicated

Source: Adapted from “Getting to Maybe”
Traditional Approaches Are Not Solving Our Toughest Social Problems

Isolated Impact

- Funders select individual grantees
- Nonprofits work separately and compete
- Evaluation attempts to isolate a particular organization’s impact
- Large scale change is assumed to depend on scaling organizations
- Corporate and government sectors are often disconnected from foundations and non-profits

Collective Impact

- All players work toward the same goal and measuring the same things
- Cross-sector alignment occurs, with government and corporate sectors as essential partners
- Organizations actively coordinate their action and share lessons learned

Imagine a Different Approach – Multiple Players Working Together to Solve Complex Issues through Collective Impact

# Conditions for Shared Success

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Common Agenda</strong></td>
<td>All participants have a <strong>shared vision for change</strong> including a common understanding of the problem and a joint approach to solving it through agreed upon actions</td>
</tr>
<tr>
<td><strong>Shared Measurement</strong></td>
<td>Collecting data and measuring results <strong>consistently</strong> across all participants ensures efforts remain aligned and participants hold each other accountable</td>
</tr>
<tr>
<td><strong>Mutually Reinforcing Activities</strong></td>
<td>Participant activities must be <strong>differentiated while still being coordinated</strong> through a mutually reinforcing plan of action</td>
</tr>
<tr>
<td><strong>Continuous Communication</strong></td>
<td><strong>Consistent and open communication</strong> is needed across the many players to build trust, assure mutual objectives, and appreciate common motivation</td>
</tr>
<tr>
<td><strong>Backbone Support</strong></td>
<td>Creating and managing collective impact requires a separate organization(s) with staff and a specific set of skills to serve as the backbone for the entire initiative and coordinate participating organizations and agencies</td>
</tr>
</tbody>
</table>

*Unlike other forms of collaboration,*

*Collective Impact is a highly structured process*
Shared Measurement is a Critical Piece of Pursuing a Collective Impact Approach

**Definition**

Identifying common metrics for tracking progress toward a common agenda across organizations, and providing scalable platforms to share data, discuss learnings, and improve strategy and action.

**Benefits of Using Shared Measurement**

- Improved Data Quality
- Tracking Progress Toward a Shared Goal
- Enabling Coordination and Collaboration
- Learning and Course Correction
- Catalyzing Action

Source: Breakthroughs in Shared Measurement and Social Impact, FSG, 2009
It’s all about continuous improvement

“To improve is to change; to be perfect is to change often”
- Winston Churchill
<table>
<thead>
<tr>
<th>Support Change</th>
<th>Improve Visibility</th>
<th>Enhance Coordination</th>
</tr>
</thead>
</table>
| “We reviewed many different tools available and made a recommendation for ETO based on the flexibility of the platform and its open architecture. It was important that we could customize the platform to suit the various needs of the organizations in the county.”

Daniel Bach
Monterey County, Department of Social Services | “ETO software helps us better identify needs in our community, inconsistencies in our service and ways we can more effectively provide for our residents. Not only is the software flexible and scalable, but it is also robust enough to meet all of our service provider’s needs and allow for more effective use of resources.”

Eric Jackson
City of Hartford | “We had one program for families in crisis where the wait times went from three weeks to the same day. We couldn’t have made improvements like this without ETO.”

Robin Bohannan
Director, Boulder County Community Services |
## AHI Advanced Modality

### Review Participant Efforts
- **Enterprise Enroll:** Search to see if a participant already exists in PHS enterprise. If found, enroll the participant into this program if they are not already active (check using Quick Search).
- **Add New Participant:** If participant is NOT found in the above search, complete demographic and enrollment information to add them to this program.
- **View/Edit Participant:** Review and/or edit demographic and enrollment information for a participant.

### Participant Assessment
- **Complete, update, and review participant assessments**
  - The Boston Foundation Assessment - Initial: for NEW Participants ONLY
  - The Boston Foundation Assessment - Follow-Up for EXISTING Participants

### Record Participant Efforts:
- **Advanced Modality:** Used to keep track of progress participants are making through the program.
- **General Coaching Assistance Efforts:** Track ALL Coaching efforts.

### Record General (Non-Participant) Efforts:
- Track all other Efforts and work not specifically related to a participant.

### Review Participant Efforts
- Use this to review all the Efforts and Assessments completed for a participant.

### Dismiss Participants:
- Dismiss participants who have completed are no longer receiving services from this program; be sure to select the proper reason for dismissal and dismissal date.
Sample Projects: Chicago, IL
Chicago Benchmarking Project

<table>
<thead>
<tr>
<th>Early Childhood Programs</th>
<th>After School Programs</th>
<th>Adult Educational Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased school readiness</td>
<td>Children and youth improve school performance</td>
<td>Adult learners increase their level of education and English literacy</td>
</tr>
<tr>
<td>Parents are more engaged in their children’s development and education</td>
<td>Children and youth have improved social skills and interpersonal behavior</td>
<td>Youth graduate from high school</td>
</tr>
<tr>
<td></td>
<td>Youth will enroll in post-secondary education after high school graduation</td>
<td>Youth will enroll in post-secondary education after high school</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High School Students</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average GPA</td>
<td>2.11</td>
<td>2.92</td>
<td>2.88</td>
<td>2.67</td>
<td>3.82</td>
</tr>
<tr>
<td>Average School Absences</td>
<td>7.78</td>
<td>5.49</td>
<td>4.36</td>
<td>4.09</td>
<td>3.07</td>
</tr>
<tr>
<td>% Taking Honors Courses</td>
<td>73.4%</td>
<td>48.3%</td>
<td>32%</td>
<td>8.3%</td>
<td>73.3%</td>
</tr>
<tr>
<td>On Time Grade Promotion</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>93.8%</td>
<td>100%</td>
</tr>
</tbody>
</table>

“The transparency has resulted in more meaningful comparative insights for each organization who prior to the project could only benchmark against themselves because external outcome statistics are difficult to find; measurements of success vary dramatically; and processes and practices are not standardized…data sharing has already led to sharing of practice models. Through commitment to the partnership, the project will result in better outcomes for children and families.” — Traci Stanley, Collaborative Director
ETO Can Build and Deploy Templates

- **Education**
  - Parenting – Early Childhood
  - Child Care/Pre-K
  - Success By 6
  - Parent Support (School Age)
  - Out-of-School Time (Education Focus)

- **Income**
  - Income & Asset Building
  - Workforce Development
  - College Access & Support

- **Health**
  - Children and Teens
  - Family and Adults
Program Templates Align Metrics

• Collect, track and measure data through TouchPoints

• Cohesive templates to administer and manage outcomes
Customer Case Study
Boulder County, Colorado
The Challenge: Siloed Services Leave Participants with Unmet Needs

Public and Private Funders, Foundations and Collaboratives dedicate Funding, Resources and time to Siloed Service Providers.

Without collaboration, siloed Service Providers are unable to understand:

- Progress within their communities
- Service utilization
- Gaps and trends in service delivery

Participants are unable to get effective, integrated services:

- Services spanning their spectrum of needs
- Effective referral network
Boulder County, Colorado

Services Offered

- Youth Services
- Workforce Development
- Early Childhood Education
- Substance Abuse Treatment
- Housing
- Health and Disability
- Senior Services

Mission
To promote the health, well being, and welfare of all county residents.
Collaborative Service Goals

- Make services accessible, timely, and relevant for all residents that need them

- Eliminate “stand-alone” approach to services, where each program is provided in its own “silo”

- Reduce the confusion in accessing services. Ensure that every door is the right door.

- Provide a higher quality of services. Provide referrals. Collaborate.

- Move people along the continuum toward self-sufficiency and stability
## Participating Agencies and Programs

<table>
<thead>
<tr>
<th>Aging Services Division</th>
<th>Boulder County Healthy Kids (CHP+)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Action Program</td>
<td>Community Justice Services</td>
</tr>
<tr>
<td>Family Self Sufficiency</td>
<td>Head Start</td>
</tr>
<tr>
<td>Housing Counseling Program</td>
<td>Impact Collaborative</td>
</tr>
<tr>
<td>Community Food Share</td>
<td>Emergency Family Assistance Association</td>
</tr>
<tr>
<td>OUR Center</td>
<td>Sister Carmen Community Center</td>
</tr>
</tbody>
</table>
Features That Boulder County Uses

- Assessments – for asking informed questions (even conditional ones), calculating appropriate scores (such as poverty level indicators) and then recommending appropriate programs
- Outcomes – for understanding how close participants and families are to achieving self sufficiency, and what needs to happen before they can live without assistance
- Case History – shows the participant and family information all in one place, so that case workers can quickly understand all of the important factors
- Reporting – in order to understand which participants and families are being served, and how they can be better served

“We had one program for families in crisis where the wait times went from three weeks to the same day. We couldn’t have made improvements like this without ETO.”

Robin Bohannan
Director, Boulder County Community Services
Outputs that Boulder County Uses

- Accurate, unduplicated participant counts
- A better understanding of participant segments and needs
- Visibility into participant progress and outcomes

<table>
<thead>
<tr>
<th>Date Range: 1/1/09 to 9/30/09</th>
</tr>
</thead>
</table>

| Unduplicated Count of Participants: 22,412 |

| Number of Participants represented: 1,432 |
| Percent of Participants represented: 100.0% |

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Was</strong></td>
<td><strong>Now</strong></td>
</tr>
<tr>
<td>In-Crisis: 4</td>
<td>In-Crisis: 1</td>
</tr>
<tr>
<td>Vulnerable: 55</td>
<td>Vulnerable: 53</td>
</tr>
<tr>
<td>Stable: 67</td>
<td>Stable: 83</td>
</tr>
<tr>
<td>Secure: 19</td>
<td>Secure: 28</td>
</tr>
<tr>
<td>Thriving: 2</td>
<td>Thriving: 2</td>
</tr>
</tbody>
</table>
Value of ETO

- Far better understanding of who is being served (and how) in real time
- Far higher quality of service for families and participants
- Greater visibility into what's happening, when, and why, without additional reporting and compliance burdens on area service providers
- Coordinated service delivery, including referrals, collaboration, and demonstrated improvement in participant and family outlooks

“The ETO platform has helped us to more efficiently allocate resources, and to more holistically address participant and family needs.”

- Robin Bohannan
  Director, Boulder County Community Services
Value of ETO

“With ETO software we doubled our job placements and significantly improved our own employee retention and job satisfaction. The improved job placement alone has been worth an additional $75,000 to $100,000 per month in revenues.”

Vice President and General Manager

ETO dramatically improves quality of matches
- Ability to rank participants for job opportunities
- Highly comprehensive assessment of employers

ETO centralizes individual staff efforts, encouraging teamwork and facilitating collaboration
- Improved accountability and ownership over placements
- Streamlined processes mean significantly less time on paperwork
- Focused staff efforts allow staff to work to individual strengths

ETO has increased placement quality. In turn, monthly placement revenue doubled since 2008
- Improved pay structure and employee retention
- Sought out by US Census for high quality placements
Workforce Case Study

Programs

- Job Readiness and Placement
- Supported Work
- Unsubsidized Placement
- Case Management
- Job Retention

Mission
To change people’s lives by lifting them from dependency into the productive world of employment.
Old Approach: Multiple Systems

- Overburdened Staff
  - Intake
  - Interviews
  - Tracking of Available Jobs
  - Employer Relations
  - Placement
  - Follow Up

Multiple Systems

Results

- Out of Sight, Out of Mind: Participants Fell Through Cracks
- Highly Cumbersome to Match Participants to Jobs
- Poor Quality of Employer Data
- Time Consuming

Social Solutions: Transforming Human Services
New Approach: Connected

ETO Results:
- Now placing participants from a centralized, comprehensive pool based on qualifications
  - ETO ensures that nobody falls through the cracks
- ETO propelled realignment of staff duties, improving quality of matches:
  - Job Match Specialists responsible for matching participants to opportunities (intake and interview)
  - Employment Reps responsible for conducting placement follow up and developing employer relationships
Critical Capabilities in ETO

**Assessments** – used to qualify employment opportunities and fine tune placement quality.

**Employment Record** – feeds into standard reports and provides a participant snapshot.

Section M. USE OF TECHNOLOGY

- **M-1. Computer Program Experience**
- **M-2. Microsoft Office Knowledge**
  - Yes
  - No
- **M-3. Microsoft Word Knowledge**
  - Yes
  - No

Section N. PARTICIPANT INTEREST AND APTITUDE SELF ASSESS

- **N-1. What are your strengths? (What are you good at?)**
  
- **N-2. What are your weaknesses? (What do you need help with?)**
  
- **N-3. Select the areas of employment that you have experience in.**
  - Automotive Mechanic
  - Bank/Teller
  - Cashier
  - Clerical/Receptionist
  - CNA/GNA
  - Construction

Participant Name: Sanchez, Marie

- **Job Title:** Janitorial Services
- **Start Employment Date:** Oct 9, 2009
- **Employer:** Tobin Company
- **Hourly Wage ($):** 8.75
- **Hours Per Week:** 40
- **Benefit Type:** Full Benefits Available
- **Employment Status:** Full-Time
- **Placement Type:** Assisted
- **Industry:** Services
- **Check In Status:** Initial Placement
- **Previous Employment:**

Employment Record:

- Transforms human services
**DASHBOARD (Rolling Progress)**

<table>
<thead>
<tr>
<th></th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td># Attended Orientation</td>
<td>JUL 119</td>
<td>AUG 69</td>
<td>SEP 69</td>
<td>OCT 33</td>
<td>Nov 27</td>
</tr>
<tr>
<td># Applications Returned</td>
<td>29</td>
<td>219</td>
<td>12</td>
<td>OCT 5</td>
<td>Nov 17</td>
</tr>
<tr>
<td># of Flexible WIA Applicants</td>
<td>20</td>
<td>23</td>
<td>7</td>
<td>9</td>
<td>13</td>
</tr>
<tr>
<td># of Referrals to other Agencies</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Carryover (Prev. M/o Yr)</td>
<td>200</td>
<td>256</td>
<td>217</td>
<td>182</td>
<td>171</td>
</tr>
<tr>
<td>New Enrollments</td>
<td>20</td>
<td>25</td>
<td>28</td>
<td>20</td>
<td>16</td>
</tr>
<tr>
<td>Total Served</td>
<td>220</td>
<td>233</td>
<td>226</td>
<td>197</td>
<td>180</td>
</tr>
<tr>
<td># Exiters Entering Follow-up</td>
<td>15</td>
<td>16</td>
<td>44</td>
<td>26</td>
<td>11</td>
</tr>
<tr>
<td>- Of those exiting, # Employed or in Postsecondary at Date of</td>
<td>3</td>
<td>2</td>
<td>13</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>- Placed in Employment or</td>
<td>5</td>
<td>5</td>
<td>6</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>- of GEO's Earned</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>8</td>
</tr>
<tr>
<td>- of HS Diploma's Earned</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>- of Occupational Credentials Earned</td>
<td>4</td>
<td>23</td>
<td>8</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td># WorkKeys Gold Earned</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td># WorkKeys Silver Earned</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td># WorkKeys Bronze Earned</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td># of Resume's Made</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Total Active End of Month</td>
<td>8</td>
<td>9</td>
<td>36</td>
<td>30</td>
<td>18</td>
</tr>
</tbody>
</table>

Note: * Positive Placements reflects the number of Exiters in the current month that have completed their 90 day Job Exit period and have a Employment or Post Secondary Education (for example: the Exiters for January 2010 will not show up until after April 2010.*

**Total Served YTD:** 374 Carry-overs plus New Enrollments

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**Annual Performance Report Due 10/01/10**

**WIA Common Measures**

* Credentials are based on every Credential during a program year (participants may have multiple credentials)
Customer Case Study
Catholic Charities of Maryland
(coalition of service providers)
Catholic Charities of Central Maryland

Programs

- Case Management
- Drug Treatment/Recovery
- Education Services
- Employment Services
- Health and Mental Health
- Support Group Network
- Transitional Housing

Mission

Improving the lives of people in need by connecting them to resources, serving daily meals and supporting efforts toward stable employment and housing.
### Monthly Report of Participants Served

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Participants</td>
<td>85</td>
<td>83</td>
<td>82</td>
<td>83</td>
<td>84</td>
<td>84</td>
</tr>
<tr>
<td>Number Employed</td>
<td>52</td>
<td>51</td>
<td>50</td>
<td>51</td>
<td>51</td>
<td>49</td>
</tr>
<tr>
<td>Number Unemployed</td>
<td>33</td>
<td>32</td>
<td>32</td>
<td>32</td>
<td>33</td>
<td>35</td>
</tr>
</tbody>
</table>

**Counting of participants and activities provided little insight into:**

- Whether processes were effective
- Whether processes could be improved
- Whether participants were actually making progress
New Approach is More Holistic

Unemployed
Part-time Employment
Full-time Employment w/o sustainable income and no career path
Full-time Employment w/o sustainable income but career path to
Full-time Employment with sustainable income

Employment

Financial

Self Sufficiency

Education

Health

Housing

Enrolled in ABE Classes
Attending ABE Classes
Progressed from ABE to GED Classes
Enrolled in GED Classes
Attending GED Classes
Took GED Test
Obtained GED

no activity this session
near to OR exceeding time for current housing
no plan for "next/future" housing arrangements
developing a housing plan - beginning to work the plan
working the housing plan very well, will be ready to move on per plan
New Approach Demonstrates Progress

### Program Work between 1/1/2009 and 5/26/2009

**Program Information:**
- Job Skills Development
- Workforce Development: Employment

<table>
<thead>
<tr>
<th>Change within this period</th>
<th>Historical Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

#### Total Impact of Efforts:

<table>
<thead>
<tr>
<th>Change category</th>
<th>1/1/2009</th>
<th>5/26/2009</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Participants Who Increased (From Initial Value):</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Participants Who Decreased (From Initial Value):</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Participants Who Increased (Within Time Period):</td>
<td>0</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Number of Participants Who Decreased (Within Time Period):</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

**Outlook as of:**

**Was**

<table>
<thead>
<tr>
<th>Employment Status</th>
<th>Was</th>
<th>Now</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unemployed</td>
<td>6</td>
<td>2</td>
<td>-66.67%</td>
</tr>
<tr>
<td>Part-time Employment</td>
<td>1</td>
<td>3</td>
<td>200.00%</td>
</tr>
<tr>
<td>Full-time Employment w/o sustainable income and no career path to sustainable income</td>
<td>1</td>
<td>1</td>
<td>0.00%</td>
</tr>
<tr>
<td>Full-time Employment w/o sustainable income but career path to sustainable income</td>
<td>1</td>
<td>1</td>
<td>0.00%</td>
</tr>
<tr>
<td>Full-time Employment with sustainable income</td>
<td>1</td>
<td>3</td>
<td>200.00%</td>
</tr>
</tbody>
</table>

**Now**

<table>
<thead>
<tr>
<th>Employment Status</th>
<th>Now</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unemployed</td>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Part-time Employment</td>
<td></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Full-time Employment w/o sustainable income and no career path to sustainable income</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full-time Employment w/o sustainable income but career path to sustainable income</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full-time Employment with sustainable income</td>
<td></td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

### Summary of Efforts:

- **Total Time Spent on by Staff:** 10 hours
- **Total Time Spent on:** 100 hours
- **Total Number of Entries:** 3
- **Average Time Spent On:** 33 hours and 20 minutes
- **Number Of Participants Receiving Efforts:** 10
- **Total Number of Staff:** 1
Critical Capabilities in ETO

**Service Plans** – allow staff to clearly address goals

**Outcome Reports** – depiction of participant and staff progress

**Assessments** – outline participant needs and strengths

**Staff Reports** – time spent, number of participant contacts, etc

**Referrals** – map participants through a program network (internal and external)

**Query Wizard** – very flexible ad hoc reporting
Value of ETO

- Efforts and outcomes are tracked online
- Managers have far greater visibility into who they are serving
- Participants and families benefit from the holistic and coordinated services approach
- It’s easier than ever to see which programs are making a difference, and why

“We secured over $1M in additional grants last year by measuring and improving the effectiveness of our programs, and then demonstrating those results in our proposals. We couldn’t have done this without ETO.”

– Molly Nash, Catholic Charities
Critical Capabilities in ETO

Assessments – used to qualify employment opportunities and fine tune placement quality.

Employment Record – feeds into standard reports and provides a participant snapshot.
Dashboards Promote Ease of Use
Do’s & Don’ts from Experience

1. Don’t allow privacy rules to limit effectiveness  
   Do seek common participant data sharing agreements

2. Don’t let differences in approach dictate measurement  
   Do identify common goals that everyone contributes towards

3. Don’t let funder requirements fragment the effort  
   Do seek to simplify data collection across funders

4. Don’t assume everyone will want to participate  
   Do develop a shared vision and articulate shared value

5. Don’t look the other way because you don’t fund it  
   Do innovative to create new forms of collaboration

6. Don’t forget about data that could change how you work  
   Do seek the right data to create actionable insights
Reporting & Intelligence
**Data Sets:** Universe Allows You to Build Your Own Reports

- Business Objects term
- Subset of ETO SQL database
- Group by related data

### Available Universes

**Participant:** demographics, enrollment, household/family, referrals, assessments, Employment, Service Activity

**Partner:** name, attributes, contact

**Program:** name, group, type, id

**Survey:** name, questions, dates

**Case Load**
Drag & Drop Graphics – Drill Down

Drag and Drop graphical reports on any tabular data set

Ability to select a count and see detailed, client specific information, where authorized
Summary Reports

Pull reports from ETO to see how many individual lives you are impacting.

<table>
<thead>
<tr>
<th>Target Area - Education</th>
<th>Number of Active Participants</th>
<th>Number of Active Households</th>
<th>Number of Enrolled Participants</th>
<th>Number of Enrolled Households</th>
<th>Number of Dismissed Participants</th>
<th>Number of Dismissed Households</th>
<th>Total Serviced Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDUCATION: Council on Education</td>
<td>11</td>
<td>7</td>
<td>6</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td>5</td>
</tr>
<tr>
<td>EDUCATION - Greater Fairfield School</td>
<td>12</td>
<td>5</td>
<td>12</td>
<td>5</td>
<td>2</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>EDUCATION - Head Start Service Agency</td>
<td>13</td>
<td>8</td>
<td>13</td>
<td>8</td>
<td>1</td>
<td>0</td>
<td>9</td>
</tr>
<tr>
<td>EDUCATION - School Strategies</td>
<td>49</td>
<td>31</td>
<td>13</td>
<td>5</td>
<td>5</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>EDUCATION - The Baltimore Foundation</td>
<td>35</td>
<td>29</td>
<td>6</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Total</td>
<td>119</td>
<td>80</td>
<td>55</td>
<td>26</td>
<td>14</td>
<td>8</td>
<td>33</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Target Area - Health</th>
<th>Number of Active Participants</th>
<th>Number of Active Households</th>
<th>Number of Enrolled Participants</th>
<th>Number of Enrolled Households</th>
<th>Number of Dismissed Participants</th>
<th>Number of Dismissed Households</th>
<th>Total Serviced Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEALTH - Let's Move Foundation</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Target Area - Income</th>
<th>Number of Active Participants</th>
<th>Number of Active Households</th>
<th>Number of Enrolled Participants</th>
<th>Number of Enrolled Households</th>
<th>Number of Dismissed Participants</th>
<th>Number of Dismissed Households</th>
<th>Total Serviced Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>INCOME: Crossroads Association</td>
<td>29</td>
<td>0</td>
<td>29</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>INCOME: Financial Stability Council</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>INCOME: The Center for Working Women</td>
<td>16</td>
<td>0</td>
<td>16</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>46</td>
<td>0</td>
<td>46</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
Outcome Statement: 85% of Young Adults will discharge from the program having met their individualized residency goal.

<table>
<thead>
<tr>
<th>Community Partner</th>
<th>Number of Dismissed Participants</th>
<th>Percent Reaching Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>8th Ave Services Organization</td>
<td>33</td>
<td>69.70%</td>
</tr>
<tr>
<td>Aiding Up Rescue Mission</td>
<td>17</td>
<td>82.35%</td>
</tr>
<tr>
<td>Child and Family Services</td>
<td>19</td>
<td>52.63%</td>
</tr>
<tr>
<td>House of Sara</td>
<td>21</td>
<td>85.71%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Benchmark</th>
<th>Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elopement</td>
<td>At or exceeding goal</td>
<td>✓</td>
</tr>
<tr>
<td>Individualized Residency Goals Met</td>
<td>Between 65% - 84%</td>
<td></td>
</tr>
<tr>
<td>Transitioned to a higher level of care</td>
<td>64% or less</td>
<td>❌</td>
</tr>
<tr>
<td>Violation of Program Rules and Expectations</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Key Indicator Reports

Target Issue: Achieving greater financial stability

Intended Result: Lower-income working families move towards financial independence

Indicator: Percentage of lower-income working families that spend more than 40% of their income on housing.

<table>
<thead>
<tr>
<th>Community Partner</th>
<th>% of families spending less than 40%</th>
<th>Increase or Decrease from initial report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crossroads Association</td>
<td>85.00000</td>
<td>Increase</td>
</tr>
<tr>
<td>Financial Stability Council</td>
<td>43.00000</td>
<td>Increase</td>
</tr>
<tr>
<td>The Center For Working Women</td>
<td>10.00000</td>
<td>Decrease</td>
</tr>
</tbody>
</table>

Number of Individuals by School Readiness Skills Achieved and Community Partner
ETO Analytics: Tell Me What I Don’t Know
ETO - Cohort or Individual
ETO - Complimentary or Supplementary Services

Cohort & Complimentary Services

Graphing Individual Progress

Standard Reporting Rubrics

- Reporting By Group (Class)
- Staff
- Program
- Partner Agency
- Any National/Regional Data Set
## ETO - Staff Impact & Performance

<table>
<thead>
<tr>
<th>Participant Full name</th>
<th>Was</th>
<th>Now</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>McGraw, Faith</td>
<td>Participant is in Imminent Danger</td>
<td>Participant lives in Permanent Housing</td>
<td>4</td>
</tr>
<tr>
<td>Clark, Kelly</td>
<td>Participant is not in a Safe or Stable place</td>
<td>Participant lives in Permanent Housing</td>
<td>3</td>
</tr>
<tr>
<td>Brown, Whitney</td>
<td>Participant is in Temporary Housing</td>
<td>Participant lives in Permanent Housing</td>
<td>2</td>
</tr>
<tr>
<td>DiMarzio</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ivason</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>James</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Richard</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### ETO: Staff (Box Score)

**Periods:** From 1/6/2006 To 10/13/2006

#### Rich Dauer
- 8th Avenue Services Organization

#### Rich Dauer vs. Staff Average
- Participant Gain/Loss Avg: 0.889
- Participant Efforts Gain Avg: 0.863

#### Compare Staff > Decrease At Risk Behaviors

<table>
<thead>
<tr>
<th>Staff</th>
<th># of Participants</th>
<th>Gain</th>
<th>Loss</th>
<th>Average</th>
<th>Efforts Recorded</th>
<th>Efforts Gain</th>
<th>Average</th>
<th>Take Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dauer, Rich</td>
<td>9</td>
<td>8</td>
<td>0</td>
<td>0.889</td>
<td>41</td>
<td>19</td>
<td>0.463</td>
<td>View Staff</td>
</tr>
<tr>
<td>Garcia, Kiko</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0.000</td>
<td>1</td>
<td>0</td>
<td>0.000</td>
<td>View Staff</td>
</tr>
<tr>
<td>Griffith, Dell</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0.000</td>
<td>1</td>
<td>0</td>
<td>0.000</td>
<td>View Staff</td>
</tr>
<tr>
<td>MacGregor, Linda</td>
<td>6</td>
<td>5</td>
<td>0</td>
<td>0.833</td>
<td>33</td>
<td>7</td>
<td>0.212</td>
<td>View Staff</td>
</tr>
</tbody>
</table>

### Staff Information

- **Rich Dauer**: 8th Avenue Services Organization
- **Participant Gain/Loss Avg**: 0.889
- **Participant Efforts Gain Avg**: 0.863

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Cost to Serve and Cost to Impact

### Total # of Participants Impacted

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant is not interested in College</td>
<td>7</td>
</tr>
<tr>
<td>Participant is interested without action</td>
<td>10</td>
</tr>
<tr>
<td>Participant beginning to work towards College</td>
<td>12</td>
</tr>
<tr>
<td>Participant working intensely towards College</td>
<td>11</td>
</tr>
<tr>
<td>Participant accepted into College</td>
<td>8</td>
</tr>
</tbody>
</table>

### Cost To Serve

<table>
<thead>
<tr>
<th>Category</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant is interested without action</td>
<td>$116.29</td>
</tr>
<tr>
<td>Participant beginning to work towards College</td>
<td>$161.74</td>
</tr>
<tr>
<td>Participant working intensely towards College</td>
<td>$91.29</td>
</tr>
<tr>
<td>Participant accepted to College</td>
<td>$199.07</td>
</tr>
</tbody>
</table>

### Cost To Impact

<table>
<thead>
<tr>
<th>Category</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed first semester</td>
<td>$538.80</td>
</tr>
<tr>
<td>Completed second semester</td>
<td>$809.72</td>
</tr>
<tr>
<td>Completed third semester</td>
<td>$2,231.67</td>
</tr>
<tr>
<td>Completed fourth semester</td>
<td>$390.63</td>
</tr>
</tbody>
</table>
# Live Office Report Publication to Stakeholders

## 8th Avenue Services Organization Annual Report

### 8th Avenue Services Organization Annual Report

2400 Boston Street, Baltimore, MD 21224  
Email: fake@socialsolutions.com

### DAYS AND HOURS OF OPERATION

<table>
<thead>
<tr>
<th>CLUB SITE CONTACT INFORMATION</th>
<th>Phone</th>
<th>Fax</th>
</tr>
</thead>
<tbody>
<tr>
<td>866.732.3560</td>
<td>866.732.3560</td>
<td></td>
</tr>
</tbody>
</table>

### Mailing Address

<table>
<thead>
<tr>
<th>Mailing Address</th>
<th>Membership Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2400 Boston Street, Baltimore Maryland 20810</td>
<td>2400 Boston Street, Baltimore Maryland 20810</td>
</tr>
</tbody>
</table>

### REGISTERED MEMBERS

<table>
<thead>
<tr>
<th>Age</th>
<th>Number of Males</th>
<th>Number of Females</th>
<th>Total Registered Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 years-old and under</td>
<td>3</td>
<td>9</td>
<td>12</td>
</tr>
<tr>
<td>6 years-old</td>
<td>14</td>
<td>31</td>
<td>45</td>
</tr>
<tr>
<td>7 years-old</td>
<td>23</td>
<td>37</td>
<td>60</td>
</tr>
<tr>
<td>8 years-old</td>
<td>31</td>
<td>48</td>
<td>80</td>
</tr>
<tr>
<td>9 years-old</td>
<td>33</td>
<td>59</td>
<td>92</td>
</tr>
<tr>
<td>10 years-old</td>
<td>31</td>
<td>62</td>
<td>93</td>
</tr>
<tr>
<td>11 years-old</td>
<td>20</td>
<td>32</td>
<td>52</td>
</tr>
<tr>
<td>12 years-old</td>
<td>17</td>
<td>87</td>
<td>104</td>
</tr>
</tbody>
</table>

### REGISTERED MEMBER ETHNICITY

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>African-American</td>
<td>54%</td>
</tr>
<tr>
<td>Asian</td>
<td>0%</td>
</tr>
</tbody>
</table>

2008 Total: 100

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Go beyond funding services to true Impact Strategies
Focus strategies on underlying issues

When solving problems, 

dig at the roots

instead of just hacking at the leaves.

- Anthony J. D’Angelo

The College Blue Book
Examples of Changes in Community Conditions that can Benefit Populations

**Target Population outcome**

Single mothers not taking advantage of public and employer benefits begin to use those benefits to increase their incomes

**Supporting changes in community conditions**

- *in organizations* Employers adopt opt-out policies for benefits that increase employee income
- *in systems* Public benefit programs adopt uniform eligibility requirements and applications, 1-visit application procedures
- *in neighborhoods* Neighborhood associations put information on public benefits in places where mothers go frequently
- *in personal networks* Friends and family members encourage low-income mothers to use free tax-preparation services
Pathway

- Setting Goals 2008 – Now what?
- Investing in tools to help UWCI measure progress toward goals
- Research Scans on research and evidence based models, best practices,
- Development of Strategy Maps
- Year 1
  - All funded programs used Scorecard to show progress on performance measures
  - 15 Agencies used ETO to track client level data
  - Volunteer Cabinets review each program and made investment decisions with emphasis on alignment to the area of Education, Income, and Health
Year 2
- Reevaluation of performance measures
- Development of Alignment Map
- Volunteer Cabinets review each program and made investment decision with emphasis on program performance, and alignment to the goals for Education, Income, and Health
- All funded programs used Scorecard to show progress on performance measures
- 20 Agencies used ETO to track client level data

Year 3
- Refinement of performance measures
- Refinement of Alignment Map
UWCI – Education Alignment Map

Education Alignment Framework
Aligning Target Performance Measure to the Headline Indicator

Headline Indicator
Percent of high school students in central Iowa who graduate on time

Result 1 (R1) – Children are born healthy and develop on track

Tier I
Secondary indicators that influence headline indicator:
1. Children are born at normal birth weight (R1)
2. Infant mortality rate (R1)
3. Immunization rate (R1)
4. Decayed teeth or cavities in the past 6 months (statewide) (R1)

Trends based on research:
1. High Predictive power
2. No Incremental results over time

Tier II
Secondary indicators that influence headline indicator:
1. Children are born at normal birth weight (R1)
2. Infant mortality rate (R1)
3. Immunization rate (R1)
4. Decayed teeth or cavities in the past 6 months (statewide) (R1)

Trends based on research:
1. Less Predictive power
2. No Incremental results over time

Tier III
Secondary indicators that influence headline indicator:
1. Children are born at normal birth weight (R1)
2. Infant mortality rate (R1)
3. Immunization rate (R1)
4. Decayed teeth or cavities in the past 6 months (statewide) (R1)

Trends based on research:
1. Less Predictive power
2. No Incremental results over time

Tier IV
Secondary indicators that influence headline indicator:
1. Children are born at normal birth weight (R1)
2. Infant mortality rate (R1)
3. Immunization rate (R1)
4. Decayed teeth or cavities in the past 6 months (statewide) (R1)

Trends based on research:
1. Less Predictive power
2. No Incremental results over time

Level I
Strategy/Performance measure (directly contributes to the population indicator)

Performance measures:
1. Number of children who were at risk for expulsion who were retained in the classroom
2. Kindergarten entry scores (R2)
3. 4th grade reading (R3)
4. 8th grade reading (R4)
5. High school graduation rate (R5)
6. Average daily attendance (R3)/(R4)

Level II
Strategy/Performance measure (influences the population indicator)

Performance measures:
1. Number of parents who received services based upon referrals (A)
2. Number of parents who received services based upon referrals (A)
3. Increased participation in child education (A)

Level III
Strategy/Performance measure (influences the population indicator)

Performance measures:
1. Number of children born at a healthy birth weight (6.5 lbs. or more)
2. Number of children receiving developmental screening

Level IV
Strategy/Performance measure (influences the population indicator)

Performance measures:
1. Number of participating families that improve or maintain healthy functioning, problem-solving, and communication (A)
2. Number of families who report improved nurturing and attachment between the parent and the child (A)
3. Number of participating families who increase their knowledge about child development and parenting (A)
4. Number of children who meet weekly

Social Solutions, transforming human services

61 November 1, 2012
Strategy 3.3/4.3: Provide quality out of school opportunities for early grade/middle grade students that reinforce and enhance learning

1. Number of students who improve or maintain their attendance in school (A)
2. Number of students who improve their attendance in school by 50% or more (A)
3. Number of children transitioned from fifth grade to sixth grade

Strategy 5.1: Create a supportive learning environment for all high school students
1. Number of students who return to school
2. Number of students identified as having DOP indicators who are on track to graduate on time based upon credits earned
3. Number of moms who remain in school and graduate at time of discharge

Strategy 5.2: Re-engage dropouts in school
1. Number of students who graduate from high school on time (A)

Strategy 5.3: Engage families of high school students more effectively
1. Number of students who improve academic risk factor at exit (attendance, behavior, poor grades)
# Results Scorecard

## Early Grade Success

### Population Results

<table>
<thead>
<tr>
<th>CI: Education: All youth are ready for college, work and life</th>
</tr>
</thead>
<tbody>
<tr>
<td>CI: Headline: Percent of Youth that graduate from high school on time</td>
</tr>
<tr>
<td>Prior Year</td>
</tr>
<tr>
<td>89.3%</td>
</tr>
<tr>
<td>CI: Percent of Youth receiving FRPL that graduate from high school on time</td>
</tr>
<tr>
<td>Prior Year</td>
</tr>
<tr>
<td>78.0%</td>
</tr>
<tr>
<td>CI: Percent of Minority Youth that graduate from high school on time</td>
</tr>
<tr>
<td>Prior Year</td>
</tr>
<tr>
<td>81.3%</td>
</tr>
</tbody>
</table>

## Program Performance

<table>
<thead>
<tr>
<th>ER 2: Early Grade Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>ER 2: Number of students participating in after- and out-of-school activities</td>
</tr>
<tr>
<td>8727</td>
</tr>
<tr>
<td>ER 2: Number of students participating in after-school activities</td>
</tr>
<tr>
<td>1211</td>
</tr>
<tr>
<td>ER 2: Number of students who attend after-school program 3 days a week or more</td>
</tr>
<tr>
<td>926</td>
</tr>
<tr>
<td>ER 2: Percent of students who attend after-school programs 3 days or more a week</td>
</tr>
<tr>
<td>76.5%</td>
</tr>
<tr>
<td>ER 2: Number of students who improve their attendance in school</td>
</tr>
<tr>
<td>N/A</td>
</tr>
</tbody>
</table>
Program Outcome Measurement Contributes to Community Impact

- Program outcome measurement creates sustained changes in community conditions:
  - Helps human services become more effective
  - Shifts the focus of programs, systems and funders from activities to client benefits
  - Changes the community’s definition of “results”
Program Outcome Measurement  Contributes to Community Impact

Learning from program outcomes guides agendas for community impact by identifying:

- Effective practices
- Gaps in services
- Community conditions creating barriers for program clients
- System and institutional issues beyond programs’ influence (policies, practices, resource allocations, inter-system inconsistencies)
- Action steps for community impact (advocacy, collaboration, initiatives)
- Issues needing further study
Program Outcome Measurement Contributes to Community Impact

* Program outcome data helps a United Way:
  ✓ Assert leadership in results-oriented philanthropy
  ✓ Show accountability to donors & community
  ✓ Measure impacts of system and policy changes
  ✓ Be a learning & problem-solving organization
  ✓ Focus on results in marketing & campaign messages
  ✓ Attract new donors, new dollars
PerformWell Content Areas

Measure Outcomes

- Education, school climate
- Workforce competence
- Employment
- Housing
- Physical activity & diet
- Aggressive and antisocial behavior
- Substance abuse
- Self-management

Improve Service Delivery

- Family-based substance abuse prevention
- Out-of-school time
- Workforce
- Mentoring
- School-based bullying prevention
- School-based substance abuse prevention
- Tutoring
PerformWell Versions 1.5 and 2

- Quarterly newsletter
- Community of practice
- Webinars
- Ratings
- Additional content development
  - Child care
  - Civic engagement
  - Gang prevention
  - Parenting
  - School Readiness
# Advisory Board Members

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization/Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diana Aviv</td>
<td>Independent Sector</td>
</tr>
<tr>
<td>Viki Betancourt</td>
<td>World Bank</td>
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<td>James Firman</td>
<td>National Council on Aging</td>
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<td>David Hunter</td>
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<td>Irv Katz</td>
<td>National Human Service Assembly</td>
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<td>Mike Lawson</td>
<td>International City/County Management Association</td>
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<td>Jon Pratt</td>
<td>Minnesota Council of Nonprofits</td>
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<td>Cynthia Strauss</td>
<td>Fidelity Charitable Gift Fund</td>
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<td>Nick Torres</td>
<td>Philadelphia Schools Project</td>
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<td>Jane Wales</td>
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Funders

Edna McConnell Clark Foundation
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World Bank Community Group
Helping practitioners deliver more effective programs
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