Defining and Measuring Success

Joint Funder Training

February 23, 2018

Training Focus

Session 1:

- Importance and role of Performance Management
- Introduce and create a Theory of Change
- Create a roadmap for defining success

Session 2:

- Identify data that will gauge progress & success
- Collect and use this data to improve services

Today's Agenda

- •Introductions 25 mins
- Importance of Outcomes & Impact 15 mins
- Theory of Change 15 mins
- Theory of Change Exercise 15 mins
- ●Break 5 mins
- Introduction to Logic Models and Indicators 1 hour
- Exercises 20 mins.
- •Q&A

Take a Minute and Answer



➤ What do you think of when you hear impact, outcomes, evaluation, logic models?

➤ What do you hope to get out of today's session?

Today's Presenters



Melinda McAliney

Director, Brown Sisters Foundation



Rebekah Miller

Program Officer, Lutheran Foundation of St. Louis



Emily Uzzle

Director, Learning and Evaluation United Way of Greater St. Louis

Why Funders Care

- Strategic Plans
- Mission/Vision
- Board
- Constituents
- Clients/End Users

- Limited Resources
- Increased Scrutiny
- Professional EthicalObligations
- Transparency
- Accountability

Members of Funders Learning & Evaluation Group (FLEG)

- ARCHS St. Louis
- Brown Sisters Foundation
- Community and Children's Resource Board of St. Charles
- Daughters of Charity Foundation
- Jewish Federation of St. Louis
- Lutheran Foundation of St. Louis

- Mental Health Board
- Missouri Foundation for Health
- St. Louis County Children's Services Board
- The Staenberg Group
- United Way of Greater St. Louis

Exercise

How did you get here today?



The Importance of Outcomes & Impact

Societal Focus on Outcomes

- Accessibility of technology
- Increased accountability
- SROI and impact
- Complex social issues
- Availability of best practices & evidence base





Organizational Focus on Outcomes

- Set goals and assess progress
- Determine if services help or harm
- Improve service quality
 O Build a learning culture
- Focus resources to maximize impact
- Better understand and communicate impact
 Attract additional resources

Organizational Progression

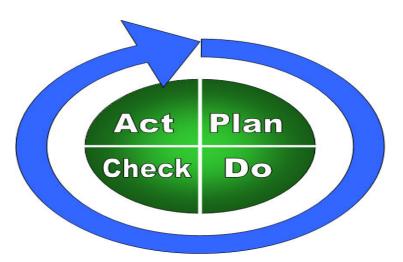
Good Intentions

Counting Outputs

Measuring Outcomes

Managing Performance

PDCA CYCLE



- P Design (or revise) your process
- D Implement your plan
 - Measure & analyze results compare with expectations
 - Take action based on what you learned

Theory of Change

Theory of Change Basics

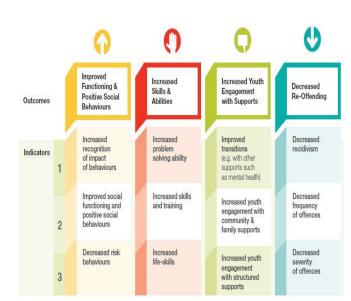
- Bridges strategy and results
- Blueprint for solving community/client issue
- Starts with desired change
 - o Identifies efforts to achieve change
- Articulates assumptions
 - o How & why change will happen

Theory of Change - Key Components

Desired Programs, Services & Change/ Outcomes **Interventions Assumptions**

Theory of Change - Different Forms

- Conceptual foundation
- Formal process and product
 - Causal Pathway Map
 - Outcomes Framework



Theory of Change - Key Questions

- Who are you seeking to influence?
- What benefits are you seeking to achieve?
- How will you make this happen?
- Why will your theory work?
- When will you achieve them?
- What is your context?

A Robust Theory of Change is...

- Meaningful
- Plausible
- Doable

- Measureable
- Monitorable



Theory of Change - Examples & Resources

- Fivers Children Foundation
- SOAR Opportunity Fund
- Templates
- Mission Box https://www.missionbox.com
- Annie E. Casey Foundation http://www.aecf.org/resources/theory-of-change/
- TOCO (Theory of Change Online) software www.theoryofchange.org
- David Hunter Consulting http://dekhconsulting.com

BREAK!!

Introduction to Logic Models

Which Program Would You Replicate?

Program 1

Provides tutoring to 500 students

5,000 hours of tutoring offered Each student receives an average of 10 hours of tutoring

No evidence of changes in academic performance

Program 2

Provides tutoring to 50 students

5,000 hours of tutoring offered Each student receives an average of 100 hours of tutoring

40 students increased reading levels by at least one grade level

Logic Models: Definition

A systematic & visual way to present & share your understanding of the relationships among the resources you have to operate your program (inputs), the activities you plan to do (activities/services), and the changes or results you hope to achieve (outcomes/impact).

W.K. Kellogg Foundation

A simple, visual way to show your program – from soup to nuts

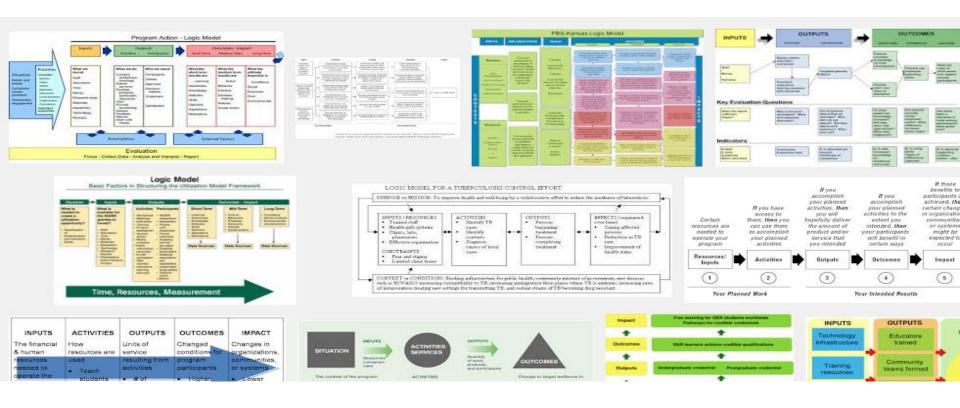
A Logic Model

- Is...
 - A means to an end.
 - A tool.
 - A visual representation of a logical thought process.
 - Ever-evolving.
 - Yours.

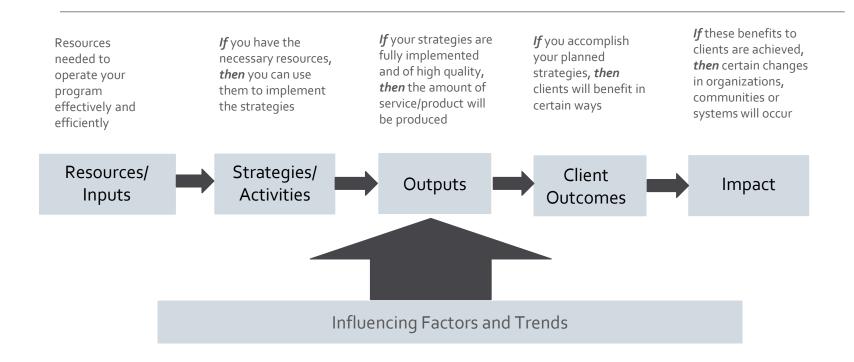
- Is Not . . .
 - An end in itself.
 - A Product.
 - A collection of disconnected parts.
 - Set in stone.
 - Ours.

Logic Model Components: Definitions & Examples

Logic Models: Shapes and Sizes



Traditional Logic Model



Traditional Logic Model

Resources

Strategies

Short-Term Outcomes

Long-Term Outcomes Community / Social Impact

Changing the Model

Resources

Strategies

Achievable Outcomes

Research says...

Community / Social Impact

Logic Model Template – Programs

Inputs (Resources) What do you need in order to do what you do?	Activities (Services) What will you do?	Outputs How much will you do? How many will you serve?	Outcomes (Results) What difference will it make?
Materials, Staff, Equipment, Space, Equipment, Training Align with Budget and Narrative	Activities, Services, Efforts	Activities Numbers Served	Knowledge, Beliefs, Attitudes, Skills Behavior Status/Condition

Types of Outcomes – Programs

Knowledge, Skill, Attitude, Belief

- What will clients know or believe as a result of your program?
 - Ex. Gain knowledge about positive parenting.

Behavior

- What will clients do differently as a result of your program?
 - Ex. Interact more positively with children.

Condition/Status

- What will be different about your clients' lives as a result of your program?
 - Ex. Family remains intact.

Logic Model Template – Capacity Building/Project

Inputs (Resources) What do you need in order to do what you do?	Activities (Services) What will you do?	Outputs How much will you do? How many will you serve?	Outcomes (Results) What difference will it make?
Materials, Staff, Equipment, Space, Equipment, Training Align with Budget and Narrative	ipment, Space, ipment, Training Numbers Serv	Activities Numbers Served	Short-term Intermediate
			Long-term

Types of Outcomes – Capacity Building/Projects

Short-term

- The first meaningful changes that follow directly from an activity
 - Ex. Add X volunteers

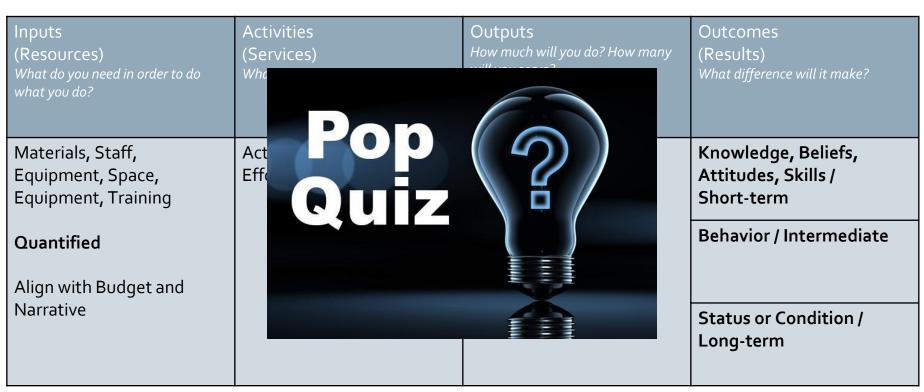
Intermediate

- Success milestone between short-term & long-term
 - Increased volunteer satisfaction

Long-term

- Second-order changes that result from successful achievement of short-term outcomes over time
 - Increased volunteer retention

Our Logic Model Template



Start at the End

- Design programs with the End in mind
- Identify various levels/types of outcomes
 - Start with ultimate ends
 - Then ask yourself, "What has to happen in order for C to occur?" = B
 - Then ask yourself, "What has to happen in order for B to occur?" = A



Show Your Logic

Inputs (Resources)

Activities (Services)

Outputs

Outcomes (Results)

In order to do that (activities), we must have this (inputs).

In order to provide that (outputs), we must do this (activities).

To achieve these results (outcomes), we must provide this (outputs).





Inputs (Resources) What do you need in order to do what you do?	Activities (Services) What will you do?	Outputs How much will you do? How many will you serve?	Outcomes (Results) What difference will it make?
Ingredients	Instructions Preheat Grease pan Mix dry ingredients Mix wet ingredients Fill 2/3 full Bake	Makes 12 muffins	 The muffins taste yummy People eat so many they gain weight People ask for more
			 You open a muffin bakery

Logic Model Template

Inputs (Resources)	Activities (Services)	Outputs	Outcomes (Results)
Materials, Staff, Equipment, Space, Equipment, Training	Activities, Services, Efforts	Activities Quantified	Knowledge, Beliefs, Attitudes, Skills Status/Condition

Outputs vs. Outcomes

Outputs

- Represent milestones in program implementation
- Describe activities
- Are about <u>your</u> efforts
- Keywords:
 - Attend, complete, provide, engage, recruit, enroll, receive

Outcomes

- Represent "solutions" to the problem you identified in your "needs statement"
- Describe <u>change</u>
- Are about the <u>client</u>
- Keywords:
 - Increase, decrease, improve, change, gain, implement, apply, demonstrate, more, less

Output or Outcome?

- Clients will create individualized service plans.
- - 2. Clients will be able to identify their medications and associated side effects.
 - 3. 100 clients will receive health screenings.
 - 4. Clients will report satisfaction with services.
- 5. Clients will experience reduced symptoms of anxiety and/or depression.
- 6. 150 clients will get jobs.

Activities vs. Outputs vs. Outcomes

Activity (What?)	Output (How much?)	Outcome (So what?)
Teach weekly workshops	32 workshops	Clients gain knowledge of coping skills.
Provide lunch every M, T, W	Serve 300 lunches to 150 people	Clients experience the love of God.
Provide Case Management	Develop case plans for 15 clients Provide 100 home visits	Clients will reduce risk factors and increase safety at home.
Match & Facilitate Mentoring	Make 12 mentor matches. 10 mentor meetings/year	Clients gain knowledge in job seeking.
Subsidize & Manage Transitional Housing	House 20 ex-offenders for 6-9 months each	Ex-offenders avoid recidivism.

Let's Practice!



Example Program

- Program Goal:
 - To strengthen families and prevent child abuse and neglect
- Services:
 - Provides in-home individual and family counseling, parent training, and case management to at-risk families

Completing a Logic Model

& quantify how much you will a result of your activities. Describe broadly the change your program is intended to make in the lives of participants.
Knowledge, Beliefs, Attitudes, Skills
Behaviors
Status & Condition START

Brainstorming Program Outcomes: Practice

- Status/Condition ultimate ends, life trajectory change
 - What will be different in the client's life as a result of this program?

Behavior Change

– What does a client need to DO, in order to achieve that status/condition change? What behavior of theirs will contribute to that ultimate change?

Knowledge/Attitude/Belief/Skill Change

– What does a client need to know/believe in order to be able to DO the necessary things?

Brainstorming Program Activities & Outputs: Practice

- In order to support clients in achieving those outcomes, what do WE need to do? (Activities)
- And how much do we need to do? (Outputs)

Brainstorming Program Inputs: Practice

- In order to carry out our activities and deliver all our outputs, what do we need to have?
 - Materials
 - Equipment
 - Staff
 - Training
 - Space
 - Partnerships
 - Etc.

Completed Program Logic Model Example

Inputs	Activities	Outputs	Outcomes
(Resources)	(Services)		(Results)
 1 FT Family Therapist 20% FT Program Manager 20%FT Intake Assistant Protective Factors training Therapeutic games & toys Cell phone for therapist Mileage reimbursement &/or car for therapist Pool of funds for basic needs assistance 	 Marketing presentations at schools Phone screenings & resource referral Comprehensive assessment Individualized service planning Weekly in-home therapy & case management Basic needs assistance when appropriate 	 300 families screened 200 families served with at least 1 session 150 families complete program 4,800 sessions 	Knowledge, Beliefs, Attitudes, Skills Parents gain knowledge of positive parenting strategies Parents learn skills to reduce stress Behavior Parents interact more positively with children Children reduce psychiatric symptoms & difficult behaviors Status/Condition Families remain intact No incidents of child abuse & neglect

Example Project

- Project Goal:
 - To increase number of new donors

Completing a Logic Model

Inputs List & quantify the materials, staff, equipment, training, etc. that you need to deliver the program	Activities List the various activities you will perform to deliver your program	Outputs List what & quantify how much you will deliver as a result of your activities.	Outcomes Describe broadly the change you program is intended to make it of participants.	
			Short-term	
			Intermediate	
			Long-term	
			START	

Brainstorming Project Outcomes: Practice

Long-term

 Second-order changes that result from successful achievement of short-term outcomes over time

Intermediate

Success milestone between short-term & long-term

Short-term

The first meaningful changes that follow directly from an activity

Brainstorming Project Activities & Outputs: Practice

- In order to achieve those outcomes, what do WE need to do? (Activities)
- And how much do we need to do? (Outputs)

Brainstorming Project Inputs: Practice

- In order to carry out our activities and deliver all our outputs, what do we need to have?
 - Materials
 - Equipment
 - Staff
 - Training
 - Space
 - Partnerships
 - Etc.

Completed Project Logic Model Example

Inputs	Activities	Outputs	Outcomes
(Resources)	(Services)		(Results)
 1 development person Donor relations committee Marketing materials Fundraising budget Donor relations database 	 Develop clear case statement Prepare marketing materials Develop donor relations committee Identify potential donors Hold fundraising event Meet with potential donors Invite potential donors to Agency XYZ for tour Offer online giving option Send annual appeal Participate in community events Thank donors twice/year 	 Marketing materials created & used Donor relations committee created & actively meeting 200 potential donors identified 1 fundraising event held Valentine's Day appeal sent Met with 100 potential donors Hosted 50 tours Attended 20 community events Online giving button created 	Short-term • More people are aware of Agency XYZ • More people are connected to Agency XYZ's mission Intermediate • Increased number of new donors Long-term • Donors are retained • Donors increase their gift

Questions?



Let's Workshop Yours

Questions to Get You Started

- What are your hopes/dreams for your project/people/group?
- What do you hope to accomplish?
- What will success look like?

Translate into outcomes

- Knowledge, attitude, belief, skill
- Behavior
- Condition/status

- Short-term
- Intermediate
- Longer-term



And..... We're Not Done Yet

Developing Measurable Indicators

Indicators

An indicator is a specific, observable, and measurable characteristic or change that will represent achievement of the outcome.

--United Way of America

A.K.A. – What will it look, taste, act, sound, and/or feel like when we reach this outcome?

Making It Measurable

- Outcome: What are we trying to accomplish?
 - Indicator: What will that look/sound/feel/taste/act like?
 - Evaluation Method/Measure: How will we know or track?



How it all fits

Inputs (Resources) What do you need in order to do what you do?	Activities (Services) What will you do?	Outputs How much will you do? How many will you serve?	Outcomes (Results) What difference will it make?	Indicators (Results - Specific) What will the difference look, feel, taste, sound, act like?
Materials, Staff, Equipment, Space, Equipment, Training Align with Budget and Narrative	Activities, Services, Efforts	Activities Numbers Served	Knowledge, Beliefs, Attitudes, Skills Behavior Status/Condition	-Specific -Measurable -Quantified - Targets -Required Format -Time-bound

Same But Different

Outcome

Parents gain knowledge of positive parenting strategies.

Indicator

75 of 80 (94%) of parents who participate in at least 10 counseling sessions will gain knowledge of positive parenting strategies within 3 months.

Writing a
Strong,
Clear
Indicator



Indicators

__ of ___ (___%) participants who ____ will ____ by ____.

Indicators

___ of ____ (____%) participants who _____ will _____ by _____.

Each Indicator specifies 6 components:

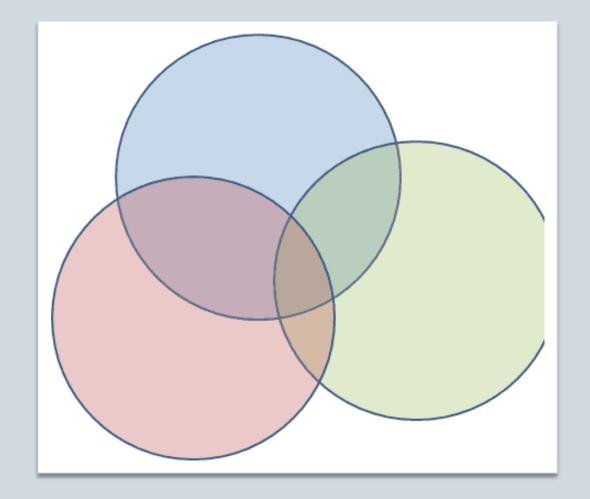
- # Achieved
- # Measured
- % Achieved
- "Who": Participants included in Measure (subset)
- "Will": Outcome
- "By": Timeframe

Example:

75 of 80 (94%) of parents who participate in at least 10 counseling sessions will gain knowledge of positive parenting strategies within 3 months.

Why Does "Who" Matter?

- Not all participants receive the same type or level of service, so we can't expect them all to experience the same type or level of change, right?
 - Drop Out
 - Multi-service programs



Writing Indicators: Key Words

- Focused on Change
 - Gain, increase, demonstrate, express, etc.
 - Apply, choose, demonstrate, join, use, etc.

- Focused on Activities
 - Receive, participate, attend, complete, enroll





Crafting Indicators: Let's Practice

__ of ___ (___%) participants who ____ will ____ by ____.

Completed Program Logic Model Example

Inputs	Activities	Outputs	Outcomes
(Resources)	(Services)		(Results)
 1 FT Family Therapist 205 FT Program Manager 20%FT Intake Assistant Protective Factors training Therapeutic games & toys Cell phone for therapist Mileage reimbursement &/or car for therapist Pool of funds for basic needs assistance 	 Marketing presentations at schools Phone screenings & resource referral Comprehensive assessment Individualized service planning Weekly in-home therapy & case management Basic needs assistance when appropriate 	 300 families screened 200 families served with at least 1 session 150 families complete program 4,800 sessions 	Knowledge, Beliefs, Attitudes, Skills Parents gain knowledge of positive parenting strategies Parents learn skills to reduce stress Behavior Parents interact more positively with children Children reduce psychiatric symptoms & difficult behaviors Status/Condition Families remain intact No incidents of child abuse & neglect

Completed Program Indicator Example

Outcomes	Indicators
Parents gain knowledge of positive parenting strategies	165 of 175 parents (94%) who participate in at least 10 counseling sessions will gain knowledge of positive parenting strategies within three months.
Parents learn skills to reduce stress	165 of 175 parents (94%) who participate in at least 10 counseling sessions will gain knowledge of strategies to reduce stress by discharge.
Parents interact more positively with children	140 of 175 parents (80%) who participate in at least 10 counseling sessions will demonstrate improved parent/child interactions by discharge.
Children reduce psychiatric symptoms & difficult behaviors	45 of 60 children (75%) who have mental health issues and complete at least 10 counseling sessions will demonstrate improved psychiatric symptoms & behavior.
Families remain intact	145 of 150 families (97%) who complete the program will remain intact at discharge.
No incidents of child abuse & neglect	145 of 150 families (97%) who complete the program will remain free of child abuse and/or neglect at 3 months post discharge.

Completed Project Logic Model Example

Inputs	Activities	Outputs	Outcomes
(Resources)	(Services)		(Results)
 1 development person Donor relations committee Marketing materials Fundraising budget Donor relations database 	 Develop clear case statement Prepare marketing materials Develop donor relations committee Identify potential donors Hold fundraising event Meet with potential donors Invite potential donors to Agency XYZ for tour Add online giving option Send annual appeal Participate in community events Thank donors twice/year 	 Marketing materials created & used Donor relations committee created & actively meeting 200 potential donors identified 1 fundraising event held Valentine's Day appeal sent Met with 100 potential donors Hosted 50 tours Attended 20 community events Online giving button created 	Short-term More people are aware of Agency XYZ More people are connected to Agency XYZ's mission Intermediate Increased number of new donors Long-term Donors are retained Donors increase their gift

Completed Project Indicator Example

Outcomes	Indicators
More people are aware of Agency XYZ	10% annual growth in awareness of Agency XYZ by target audience.
More people are connected to Agency XYZ's mission	225 of 250 (90%) of donors indicate a close connection to Agency XYZ's mission.
Increased number of new donors	Grow donations of new donors by 15% annually.
Donors are retained	215 of 250 (86%) of donors renew their gift annually.
Donors increase their gift	125 of 250 (50%) of donors increase their gift annually by 10%.

Let's Workshop Yours



Questions?



Tips for Success

- Remember your WHY
- Keep it simple
- It's not a 1-time thing keep at it, keep learning
- Perfection is the enemy of good
- Have staff/volunteers sit at the table
- Have fun and enjoy stronger programs!



THANK YOU!

And Good Luck!

(and please complete your survey!)