

MEASURING & DETERMINING PROGRAM SUCCESS

Joint Funder Training

May 2, May 21, June 18, 2019

Training Focus

Session 1 - 2018:

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

Session 2 -2019:

- Purpose and components of an evaluation plan
- Identify data that will gauge progress & success
- Collect and use this data to improve services

Today's Agenda

- Introductions and Recap (30 mins.)
- Evaluation Basics (10 mins.)
- Evaluation Plan Overview (10 mins.)
- Evaluation Plan Deep Dive (60 mins)
- Exercise (15 mins)
- Now What? (5 mins)

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 Ethical Obligations
- 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
- United Way of Greater St. Louis

THE IMPORTANCE OF OUTCOMES & IMPACT

Societal Focus on Outcomes

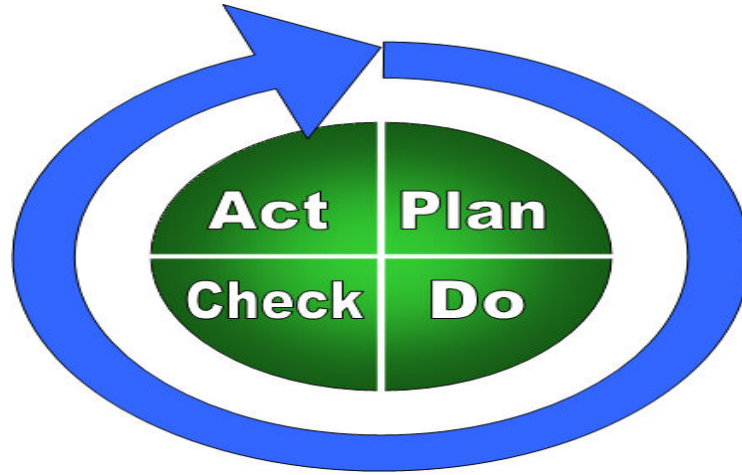
- Accessibility of technology
- Increased accountability
- SROI and impact
- Complex social issues
- Availability of best practices & evidence base



Organizational Focus on Outcomes

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

PDCA CYCLE



P Design (or revise) your process

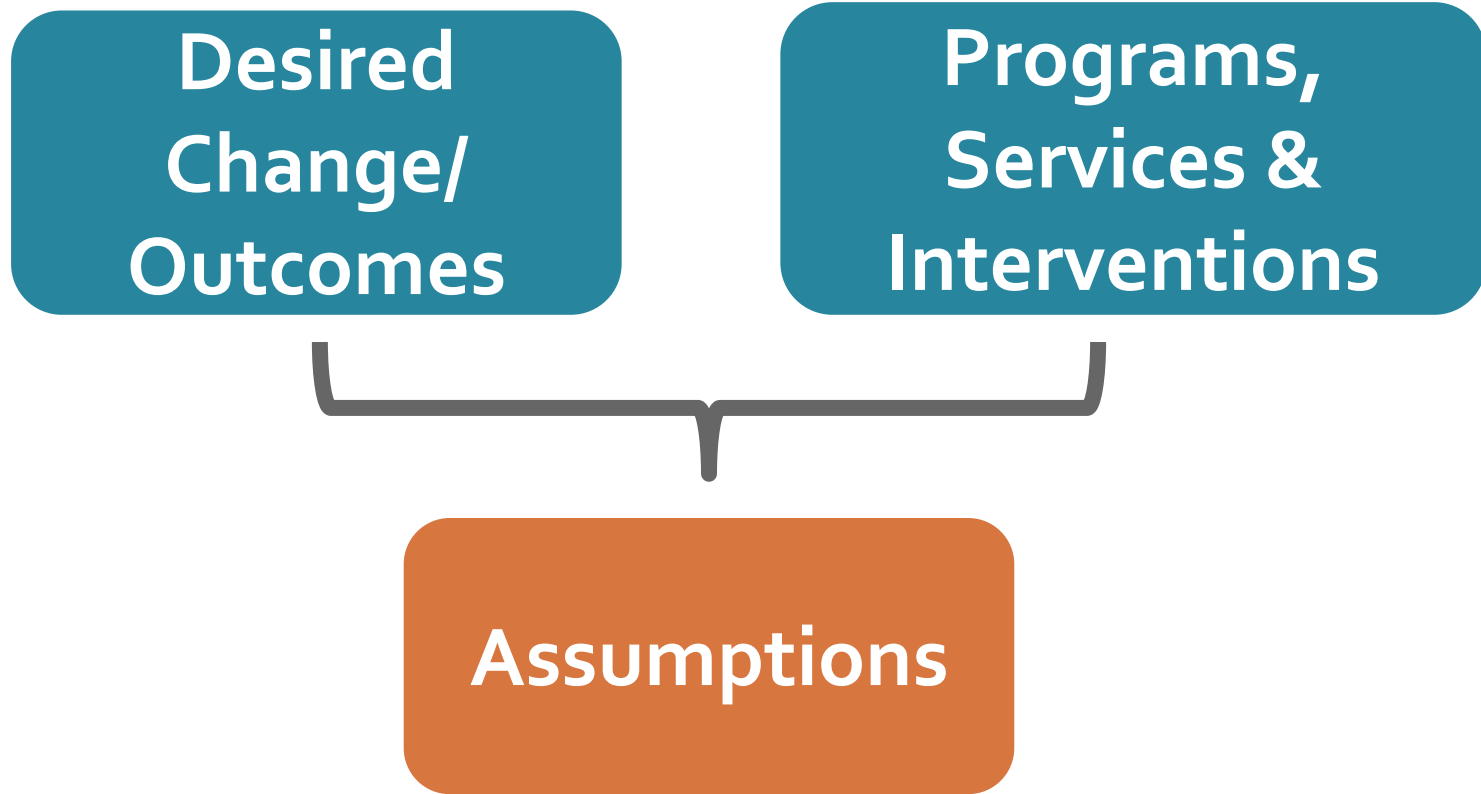
D Implement your plan

C Measure & analyze results - compare with expectations

A Take action based on what you learned

THEORY OF CHANGE

Theory of Change - Basics



A Robust Theory of Change is...

- Meaningful
- Measureable
- Plausible
- Monitorable
- Doable



LOGIC MODELS

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).

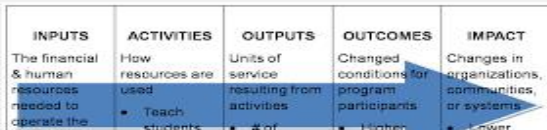
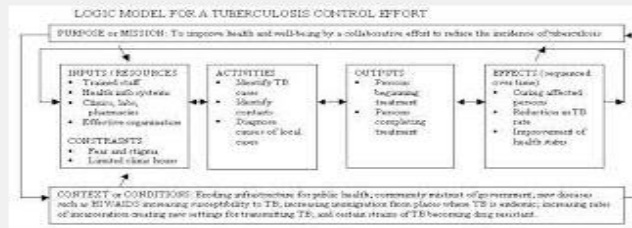
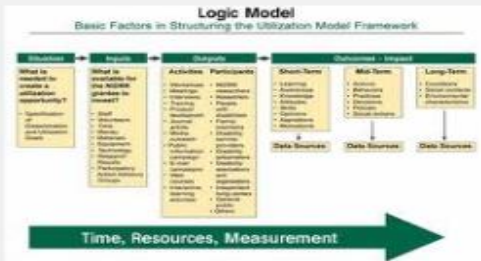
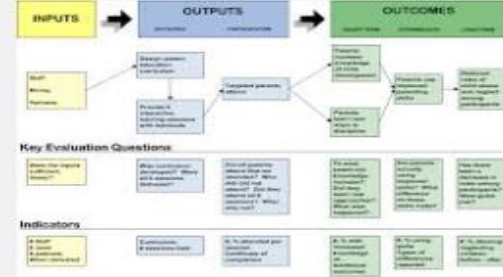
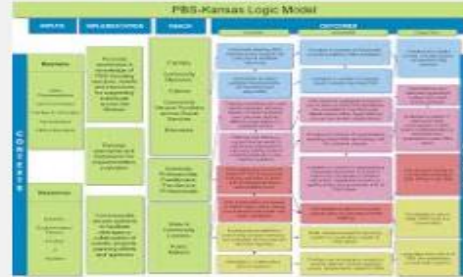
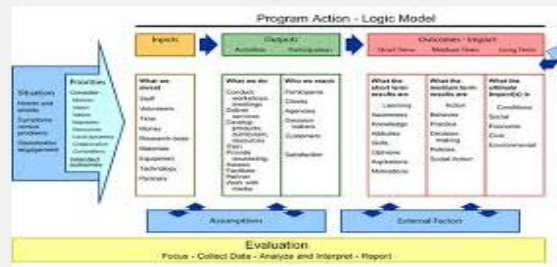
W.K. Kellogg Foundation

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 Models: Shapes and Sizes



Logic Model Template – Programs

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



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

Completed Program Logic Model Example

Inputs (Resources)	Activities (Services)	Outputs	Outcomes (Results)
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Marketing presentations at schools • Phone screenings & resource referral • Comprehensive assessment • Individualized service planning • Weekly in-home therapy & case management • Basic needs assistance when appropriate 	<ul style="list-style-type: none"> • 300 families screened • 200 families served with at least 1 session • 150 families complete program • 4,800 sessions 	Knowledge, Beliefs, Attitudes, Skills <ul style="list-style-type: none"> • Parents gain knowledge of positive parenting strategies • Parents learn skills to reduce stress
			Behavior <ul style="list-style-type: none"> • Parents interact more positively with children • Children reduce psychiatric symptoms & difficult behaviors
			Status/Condition <ul style="list-style-type: none"> • Families remain intact • No incidents of child abuse & neglect

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) <i>What do you need in order to do what you do?</i>	Activities (Services) <i>What will you do?</i>	Outputs <i>How much will you do?</i> <i>How many will you serve?</i>	Outcomes (Results) <i>What difference will it make?</i>	Indicators (Results - Specific) <i>What will the difference look, feel, taste, sound, act like?</i>
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.

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.

Completed Program Logic Model Example

Inputs (Resources)	Activities (Services)	Outputs	Outcomes (Results)
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Marketing presentations at schools • Phone screenings & resource referral • Comprehensive assessment • Individualized service planning • Weekly in-home therapy & case management • Basic needs assistance when appropriate 	<ul style="list-style-type: none"> • 300 families screened • 200 families served with at least 1 session • 150 families complete program • 4,800 sessions 	Knowledge, Beliefs, Attitudes, Skills <ul style="list-style-type: none"> • Parents gain knowledge of positive parenting strategies • Parents learn skills to reduce stress
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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.

EVALUATION BASICS

Getting Started

Evaluation

The systematic collection of information about the activities, characteristics, & outcomes of programs to reduce uncertainties, improve effectiveness, & make decisions regarding what those programs are doing & affecting.

W.K. Kellogg Foundation

A.K.A. – Did we really do what we said we were going to do with the people we said we were going to do it with?

A.K.A. – Did we help or harm people?

Purposes of evaluation

- Determine program quality
- Understand impact
- Communicate to stakeholders
- Build a case for sustainable funding
- Increase the field of knowledge

Evaluation	Questions Answered
Feasibility Study	<ul style="list-style-type: none"> • Should we move forward? • Do we have capacity?
Needs/Assets Assessment	<ul style="list-style-type: none"> • What are the needs/assets of the population? • What is the magnitude of the need? • What resources currently address this problem?
Process Evaluation	<ul style="list-style-type: none"> • How was program implemented? • How did program design deviate from implementation? • Is program reaching target population? • What is dosage and usage of services?
Outcomes Measurement	<ul style="list-style-type: none"> • Are clients achieving intended outcomes? • Are there unintended consequences of services?
Performance Measurement	<ul style="list-style-type: none"> • How are we performing organizationally? • Are we achieving strategic goals?

Levels of Evaluation

CLIENT

PROGRAM

AGENCY

COLLABORATION

COMMUNITY

EVALUATION PLAN

Evaluation Plans

- Data collection & analysis roadmap
- Identifies WHAT data will be collected
 - o Includes key outputs & outcomes
- Identifies HOW data will be collected & used



Evaluation Plan Benefits

- Clarifies what needs to be measured
- Identifies needed resources
- Streamlines practices and processes
- Identifies tasks and responsible parties
 - o Reduces duplication
- Proactively drives learning and evaluation

Evaluation Plan Components

Outcome and/or Output
(From program design tool)

Data Needed

**Assessment
Tools**

Analysis Methods

Responsible Parties

Timeline

Budget
(Resources/Funding Needed)

**Communication/
Reporting**

Example - Prenatal Health Program

Outcome Indicator/ Target	Data Needed	Assessment Tools	Analysis Method	Persons Responsible	Timeline
Changes in client knowledge, skills, and attitude	Information needed to determine achievement of indicator	Measurement tool type and name	Tools/systems that will be used to analyze results	Who is responsible to collect and analyze data	Dates and frequency of data collection
90% of clients gain knowledge about prenatal health habits that will positively affect their child	Prenatal Health Knowledge Index pre and post test scores	Pre/post comparison of scores on Prenatal Health Knowledge Index	Microsoft Excel comparison of difference in pre and post scores	Program Manager administers and scores pre/post test Data analyst runs Excel pre/post comparison and sends results to Program Manager	Pre test in first class (Jan 2020) Post test in last class (June 2020) Excel analysis due to CPO July 2020

DETERMINING DATA NEEDED

Example - Prenatal Health Program

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Identifying Data - Practice

Indicator	Data Needed
75% of Parenting Program clients increase score on Carolina Positive Parenting Assessment	
90% of Operation Work clients receive an average or above mock interview score	
30% of clients maintain improve school attendance	

Identifying Data You Need

Considerations

- Type of information needed
- Available resources
- Ethical and cultural considerations

ASSESSMENT & MEASUREMENT TOOLS

Example- Prenatal Health Program

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Types of Measurement

Quantitative (Numbers and Statistics)	Qualitative (Words and Concepts)
<ul style="list-style-type: none">• Pre/post survey• Post only questionnaire• Structured observation• Administrative data• Standardized instrument	<ul style="list-style-type: none">• Survey/interview guide• Focus group guide

Determining the Right Measurement Tools

- Weight type of data needed & best tool
 - Existing tool available?
- Consider resources and feasibility
 - Financial and time cost
 - Administration requirements
- Client access & timeline



Resources for Selecting Measurement Tools

- **Evaluation Instrument Decision Tree**
- **Checklist for Selecting Data Collection Methods**
- **Foundation Center – Tools & Resources for Assessing Social Impact**

Finding a Measurement Tool

Measurement Tool Resources

- **Instrument repositories**
 - o Measurement Instrument Database for the Social Sciences (MIDSS)
 - o PerformWell
 - o Urban Institute – Outcome Indicators Project
 - o RAND Online Measure Repository
 - o University of Vermont Libraries – Research Guides
 - o Child Trends Indicators Data Bank
 - o Forum for Youth Investment – Shared Vision for Youth Common Outcomes and Indicators

Standardized Measurement Tools

- Proven validity & reliability
- Concerns
 - Expense
 - Training requirements
 - Length
 - Fit with outcomes and population
 - Language
- Modified versions
 - May lose reliability & validity



Doing Measurement Well

- Fidelity to intended use
 - Training
 - Staff credentials
- Inter-rater reliability
 - Formal & informal ways



Designing a Measurement Tool

Measurement Tool Resources

- Instrument development resources
 - **Survey & Questionnaire Development Resources**
 - Corporation for National & Community Service
 - University of Wisconsin Extension – Questionnaire Design

Common Issues

Question	Issue
How often do you eat foods that are really bad for you, like sugar?	
Do you agree or disagree that it's not easy for kids to eat healthy?	
Do you find this program helpful for young adults & kids?	

Improving Data Collection Processes

Considering analysis can improve data collection process

- Quantify and automate where possible

Instead of:

Case notes

Observation Notes

Open text response

Can you use:

Check box

Observation Checklist

Likert scale

Dropdown

Multiple Choice

Measurement Tool - Thought Exercise

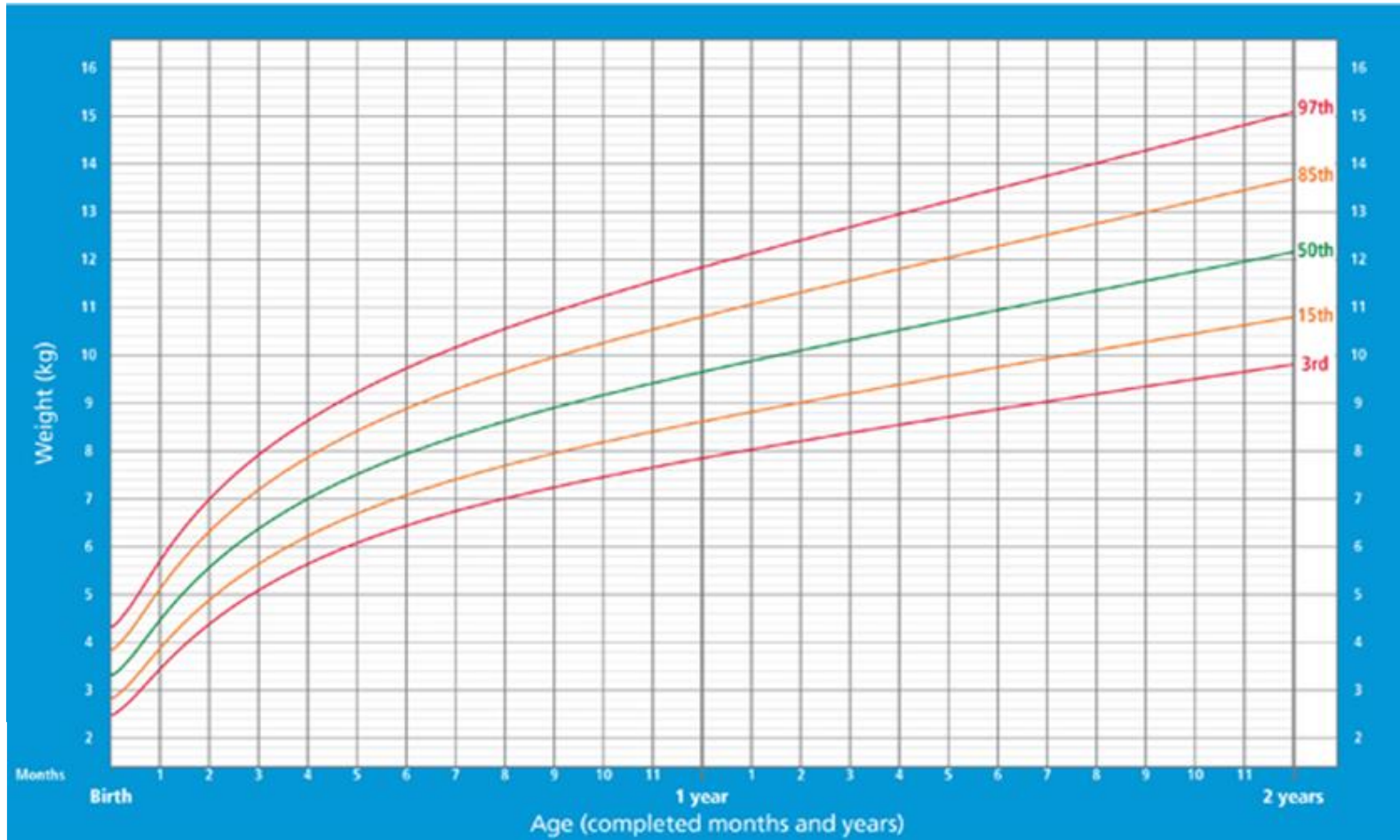
Choose one of the following and determine an effective type of measurement tool:

- Clients develop positive friendship with peers
- Clients maintain/improve course grades/academic performance
- Clients feel less isolated
- Clients maintain/improve quality of life

BREAK

DATA ANALYSIS & INTERPRETATION

Analysis vs. Interpretation



Example - Prenatal Health Program

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Data Analysis

Data Analysis Myths

Data analysis requires

- High-level degree
- Mathematical expertise
- Expensive software

Data Analysis Reality

Data analysis requires

- Data that represents outcome indicator
- Clean, analysis-ready data
- Time
- Specific evaluation questions
- Attention to detail

How to analyze data

How to “Slice & Dice” Data

- What question are you trying to answer?
 - o Examine variables that will answer or influence that question
 - o Consider key variable relationships
 - o Identify appropriate calculations

Types of Data

Quantitative	Qualitative
<ul style="list-style-type: none">• Numbers & statistics• Often objective• Often answers “what” questions	<ul style="list-style-type: none">• Words/text & concepts• Often subjective• Often answers “why” questions

Quantitative Data Analysis

Quantitative Data Analysis Basics

Key Quantitative Calculations

Mean

Median

Mode

Variability

**Frequency
Distributions**

Outcome Comparison

Data disaggregation among the change or benefit clients experience



Examine findings across all indicators

Qualitative Data Analysis

Qualitative Data Analysis

- Less structured than quantitative analysis
- Not guided by universal rules
- Data reduction is key
 - Leads to identifying key themes



Qualitative Data Analysis

Categorize/
code
responses

- Predefined codes
- Emergent codes
- Can make numerical

Identify trends
and themes

- What themes emerge that answer evaluation questions?

Often helps answer “why” questions

Data Analysis Resources

- University of Wisconsin Extension
 - Analyzing Qualitative and Quantitative Data
- Urban Institute
 - Analyzing Outcome Information
- W.K. Kellogg Foundation
 - Evaluation Tool Kit: Data analysis

Interpreting Data

Interpretation Tips

- Start with analysis of clean data
- Ask
 - So what?
 - What does this mean/tell me about my program?
 - How do we use these findings?
- Try visualizations
- Include others
- Allot time for interpretation

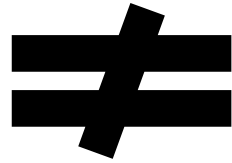
Interpreting Data

- Patterns, themes & deviations
- If results make sense
- Surprising findings & potential causes
- Focus areas for improvement
- Additional questions that arise

Causation & Correlation

Causation

One factor leads
to/causes another



Correlation

Mutual relationship
between variables
(positive or negative)

“

If you torture the data long enough, it will confess to anything.

Ronald Coarse, Economics Nobel Laureate

PROJECT & PROCESS MANAGEMENT

Example- Prenatal Health Program

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Persons Responsible

- Determine tasks needed to successfully complete evaluation plan
- Identify staff who will complete each task
- Ensure staff are aware of their role
 - Share evaluation plan with key staff
 - Create opportunities for feedback to identify any issues

Timeline

- Ensure evaluation meets deadlines
- Incorporate progress checks

Other Project Management Elements

- Communication & reporting
- Budget

PRACTICE

NOW WHAT?

Organizational Progression



A horizontal flow diagram illustrating organizational progression. It consists of four colored squares in a row: teal, olive green, yellow, and orange. The first three squares are grouped within a light gray arrow shape pointing to the right. The text inside each square is white and bold.

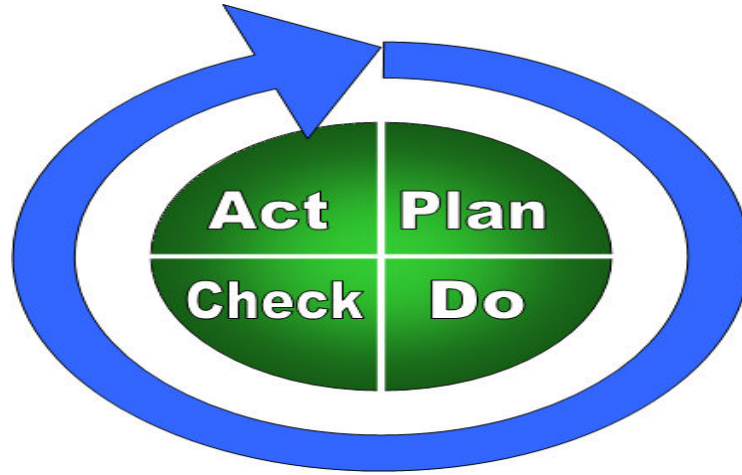
**Good
Intentions**

**Counting
Outputs**

**Measuring
Outcomes**

**Managing
Performance**

PDCA CYCLE



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

THANK YOU!

And Good Luck!

(and please complete your survey!)

A solid blue horizontal bar spanning the width of the slide at the bottom.