



Integrating Innovative Employment & Economic Stability Strategies (IIEESS) Webinar Transcript

Peer-To-Peer Learning Opportunity: Set, Measure, Report – Using Data to Improve Client Success

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TINA SMITH: Hello, everyone. Welcome to today's webinar. Today's webinar is titled Set, Measure, Report: Using Data to Improve Client Success. My name is Tina Smith and I will be your moderator for today's webinar. Before we get started, I want to review a couple of housekeeping items with you to explain how you can participate in today's webinar. When you joined today's call you may have noticed that you have been placed in listen only mode. If you have questions that you would like the presenters to address, please submit them in the Q and A box located on the right-hand side of your WebEx window. When you logged into your webinar today, your screen should have looked like the area on the top right of my slide. In the middle of the screen you should see a section where you can chat or submit questions. Even though both sections are available to you, please only use the Q and A box only. You also have the ability to change the view of your screen. By changing the view, click on the full-screen icon button located in the top right-hand corner, the same window as the presentation. You can see the arrows pointing on the slide to exit full-screen mode. To exit the full-screen mode you can just simply hover over the full-screen icon again to adjust your view. Today's webinar will be using the Raise Your Hand interactive feature. During the Q and A portion of the webinar, you will have the opportunity to verbally participate using this option. When you're ready to speak, please select the small hand icon located in the bottom of your participant's box on the right side of the screen. You will then be called and unmuted to engage in the webinar. Please note that today's webinar will be recorded. If you experience any difficulties during the webinar, please call the WebEx customer service number at 866-229-3239, select option one.

Now I would like to introduce our presenter for today, Ms. Ashley Winning. Ms. Winning serves as the Research Scientist and Vice President of Research and Evaluation for EMPATH. She joined EMPATH in 2016 after a decade of conducting both qualitative and quantitative research in Social and Behavioral Sciences. At EMPATH she's responsible for strategic planning, program development and evaluation, research development and implementation, conference planning, and staff supervision. She's also involved in mentoring. She earned her Science of Doctorate in Social and Behavioral Sciences at Harvard T. H. Chan School of Public Health and a Master of Public Health from Emory University. At this time, I would like to give the floor to Ms. Winning to start the presentation. Ms. Winning, are you there? Let's see. Are you there, ma'am?

ASHLEY WINNING: Hi. Yes, I'm here, can everyone hear me? Hi, great.

TINA: Yes.

ASHLEY: All right, thank you. I'm just going to—

TINA: You're welcome.

ASHLEY: Thanks for the intro. And welcome, everyone. Thank you for being on the call. So yes, as Tina said, I'm going to be talking about using data to improve client success, and... we've already been through this part. Here we go. So the main purpose of this presentation is to provide an overview of the outcomes measurement process and to suggest ways of reporting outcomes and using data for continuous improvement in your organization. Because this is a webinar and I'm not sure who's on the call and levels of experience with outcomes measurements, I've tried to strike a balance between kind of explaining some terms and assuming some knowledge, so please feel free to stop me if there's anything you'd like me to go into more detail on. And as Tina mentioned, we'll also have time for questions at the end. So, oops, I almost pressed my phone to advance to the next slide. Okay, there we go.

So, outcomes measurement. Outcomes measurement is a systematic way to assess the extent to which a program achieved its intended results. Oh, I should mention that one of my favorite things about PowerPoint is the use of cartoons. So I've scattered them throughout, and I think that this one does a good job of explaining why it's important to think about outcomes. So every organization hopes to deliver quality services and hopes that they are having a positive impact. And outcomes measurement, or in government agencies and businesses sometimes it's called performance measurement, that will help you understand whether you are in fact delivering the quality services that you're hoping to. So with the information that you collect you can determine maybe which activities to continue and build upon, which might need to change in order to improve the effectiveness of your program. So it's basically answering the question: What has changed in the lives of—it might be individuals, families, or even organizations, or communities—as a result of the program or the services or the activities that you've performed? Has the program made a difference? And how are the lives of participants better, or are they better, as a result? So the surgery example here is, you might be thinking, "Okay, I'm doing this great work, it's really high quality," but if the patient's dying at the end, maybe you want to be changing what you're doing. And of course you'll always have cases where you are doing it exactly right and you're not going to have the outcomes that you're hoping for. But if you are collecting over time, if you find all your patients are dying, that's clearly an issue. And so they're important for, as I said, measuring that effectiveness of an intervention. But collecting data and measuring outcomes also serve other purposes. For example, proving your value to funders and getting continued funding to actually sustain and maintain your programs. It will help identify effective practices and not so effective practices. It can also be just a useful procedure to go through to gain clarity and consensus around the purpose of your programs. And most importantly, or maybe not most importantly, but importantly, it's also used for continuous ongoing learning. So the ultimate purpose of an evaluation should be focused on the continuous learning and developing practices that move the organization toward greater effectiveness. So a successful system, a successful outcome measurement system, is you can think of it as a feedback loop where performance measurement leads to learning and then subsequent actions to change programs and improve performance.

So for this presentation I'm going to kind of follow along with the title of "Set, Measure, Report" to align with these common outcome measurement process steps. So, excuse me, the first step being identifying the outcome. So what is it that you want to be capturing? The performance indicators that go along with those outcomes and setting targets or comparison benchmarks. Then I'll very briefly talk, because this could be a whole other webinar about the implementing data collection and then analysis plans of the actual doing the measurement. And then finally, communicating and reflecting on results. And then this is something you reflect, learn and prove, and repeat, go back to maybe identifying new outcomes and you can continue the cycle.

So for set, for identifying outcomes, performance indicators, and targets. This comic here saying, "Get all the information you can, we'll think of a use for it later," is an example of how not to go about data collection and choose your measures. Ideally, you begin with a small number of clear simple measures and you're beginning with the end in mind. So as opposed to just get everything and then figure out, "Oh, I've got this and maybe I can look at this, and I'll look at this," you say, "What do I want to know?" Starting at the end: What is what we're

hoping to achieve? And working backwards from that of: What do we then need to gather and collect to show whether we are or not. So a good way to do that is a logic model. And the main kind of two steps of this phase, or the two objectives of this phase: The first is establishing a shared understanding of what the program or project is and how it's supposed to work. And doing a logic model can help in that process. And then creating a set of measures that corresponds with that logic model can be used to assess the accomplishments of staff and project primaries.

So here's very simply, and I'm sure many of you actually know this, but a logic model's just a systematic visual way to present the relationships among the resources that you have to operate the program, the activities that you plan, and then the changes or results you hope to achieve from it. So basically it's the picture of how the program is intended to work, the logic behind the program. The input section we have: What you're investing, so the ingredients you put into to operate the program. It might be the funding that you have. Maybe it's the number of staff, mentors, or employees, different tools that you can funnel in. Then the activities are what you're actually doing. What are the main things that the program does or provides? It could be mentoring. It could be a number of things including mentoring, assisting with goal setting, making referrals to specialists, that kind of thing. And then the outputs would be the tangible products. So what are the products or direct services resulting from the program activities? For example, number of people served, number of workshops held, number of trainings held, number of referrals made, things like that. And then outcomes usually get separated into short-term, intermediate, and long-term or impact outcomes. And that's really what happens because of your inputs and activities. What impact will the program have on the clients? And short-term ones are typically... usually in the short term you're thinking, we might be able to change knowledge or skills or attitudes. So it might be increasing financial literacy, enhancing job readiness, with intermediate being typically more like behavioral or policy practice, so number of participants who are maintaining permanent housing or acquiring jobs or educational degrees. And then the impact or the long-term outcome might be: we are in the long-term striving for economic self-sufficiency for low-income populations. That's an example.

In the next slide I have just a very simplified logic model that I pulled from a recent Urban Institute paper that actually could be a useful resource if anyone is looking to go through this process. And very simplified, but applicable to the TANF programs of some client outcomes regarding employment, earnings, and self-sufficiency with readiness and experience and skills being the intermediate outcomes. And then all that it takes to...the work you have to do that go into that: the trainings and do the assessments, the support services, et cetera. So not all logic models look the same, but they basically serve the same purpose, which is to graphically capture the assumptions and the cause-and-effect relationships that drive the organization's work on a project.

So once you have the sense—okay, this is what the program is intending to do, and this is how we intend to do it; this is how it fits together—then you can select what indicators you're going to use to basically answer the question: How will I know when changes have occurred or if we have achieved the outcomes that we wanted? So typically, when as the previous logic models show, when outcomes are usually kind of too broad to allow you just to collect data on that outcome, so you decide: Well, how will you make your intended outcomes measurable? And this cartoon here—so if you're trying to achieve an improvement in learning outcomes, this kid's saying, "Well, grades aren't the only way to measure outcomes. That might be one way." You might say: Have math scores gone up in the school? Or are individuals increasing their math scores? But you might also have other indicators that learning is occurring, and it might be... an indicator for learning outcomes could be percent of students who graduate. Or it might even be an observational measure done in class, or their motivation; there might be other ways to indicate that you've had an impact on their education.

So the indicators, they indicate an outcome rather than being something that would predict the outcome or occur because of the outcome. And it's best when they can be specific, and they need to be something that's observable. So that means you can either hear it, you can see it, you can count it, you can report it, or some way to enumerate it using some kind of data collection method. Some outcomes and performance indicators are much more straightforward about—oh, income, I have some ways I can capture that—whereas if you're thinking of, I'm interested in someone's sense of agency... you know, how do we... you might not just have

one measure/one number that tells you that. You might have to think about that in another way. And typically—I mean, this is just a suggestion—having one to three indicators per outcome is a nice place to start. Some that are larger and more complicated, you might have a lot more.

And then just briefly, some other considerations when you're thinking about your outcomes and your indicators... is thinking about: Who are we measuring this for? So who's that target population? And that can differ for different outcomes. So whose performance or outcomes are being measured? Is it the program itself? We want to know overall in the program how's this program doing? Is it particular staff members or mentors? How is their work going? Is it the clients or participants themselves? What achievements have they made? How do they look at the end of the program compared to the beginning? And then related to that is what level are you looking at? Is it an individual level, we're interested in individual change? Or are you interested in neighborhood change or office level, county level, even state-level, when we're talking about TANF work? And also want to be thinking about comparison groups. So when you're interested in outcomes, are you interested in just those who received a particular service and seeing what happened to those people? Or it could be people who are eligible for a service and interested in whether they're doing it or not. So all candidates for a service. And it could also be people who are currently receiving a service, so people who are currently enrolled in a program. But you may instead, for some, choose to look at outcomes only of those who have exited the program. So what happened to them at the exit? And in many cases you're kind of, you'll have some outcomes, some measures that are looking at those receiving the service and those currently in the service, and others where it's at exit. So these are just kind of questions to think about when you are starting to think about your measures and your outcomes.

And then setting targets and benchmarks can also be helpful, too, as to be realistic about what outcomes you're attempting to achieve and also for kind of tracking to see if you are on track and you're doing the work as you're hoping to meet those benchmarks and targets, and also for motivation. And so it targets just your desired level of achievement and for... if you're looking at: so here's the target, it's important to establish what that baseline is for the indicators that you're planning to measure over time to see how they move towards the target. And you may want to have comparisons. Comparison is another useful way to measure performance, so it would be performance against something else. It could be another period of time, so like previous fiscal year. It could be another organization that does similar work, how you compare there. Or just an established set of standards. If we know that this is sort of the gold standard level for this, and we want to bring the community that we serve up to that level. That's another way to set a benchmark or target. And it can be static or relative. So a fixed or static target would be, for example, 75% of clients achieve X. Or it could be relative, which might be a ranking in comparison to others. So you know, we are, the staff, is in the top five at the organization. Or it could be relative to other programs or performance over time. So we want to see a 10% increase in this outcome from our previous years, so it's relative to the previous year. And then also you think about who is setting them. So at EMPATH, we have some targets that are programs that are funded by government and other agencies; they all set a target. They say, we want you to achieve this. In other cases we're setting it with the staff based on a comparison to... based on our understanding of the whole situation, including where people are beginning and what things we have seen in previous years, so what we think is possible to achieve. And we always try to kind of stretch ourselves, but also be realistic. And the other thing when thinking about targets is do you want to adjust for and how do you want to adjust for conditions? So that could be either demographic conditions. So might you have one target for, let's say, people who enter the program without a high school or a HiSET... a high school diploma or HiSET, and another expectation or target for those who do. And might you also... then thinking too about like just the broader context, what are the economic conditions that year? So sometimes with our targets we'll say, especially with housing ones, if we know, "Oh, there's a housing freeze in Boston right now," or we know that we're getting a certain amount of vouchers, we will align our targets to what the conditions are existing in that area.

All right, so now on to actually creating and implementing a data collection plan and analyzing that data. So this table might not be totally applicable, but you can use the heading part there on the top line in black. So you have your outcome, and you'll have a number of them, but you'll have that first outcome. And then what is the indicator for that? So this example here of increased ability to raise funds for program services. The indicator

might be the number and percent of organizations who put new fundraising practices in place. Then you'll have... well, what data collection method would you use? And we'll just talk briefly about some of those options. When will it be collected? Is this something you collect at baseline and then at exit or every month? So frequency and timing of collection. Who is going to collect it? How, so what will they do to collect it? Then how will the data collected be monitored? All of these are important things to consider as you set up the program of your outcomes measurement system.

So I think this is my only slide, actually, under this section and I shoved a lot in here, but also I'm intending to just go through it briefly. Data collection methods—so some measures just generate more consistence, so reliable and accurate, which is the validity piece, information than others. And so you want to be thinking about that. In some cases you can use measures that have already been used so you know, oh, this has shown to be accurate in a similar population. And you also want to think about what resources are available, so that includes: Staff availability and staff expertise, time, money, all those things. Because it's time-consuming. So all the pieces that will go into the ability to be collecting data and also being culturally sensitive with the measures. So the method should fit the language, the norms, and the values of the groups from whom you're collecting data. Then you can think about other sort of more specific types of data collection methods. So how are you going to be collecting this? Is it surveys, interviews, focus groups, observation, or reviewing existing records that other people have collected or that you've collected in the past that you're just kind of going to go over, information that's there? So those are all considerations for thinking of how, the data collection methods.

And then there are certain designs to think about. Post-only measures would be you're just collecting data once at the end of an activity or service. This can work... this can be sufficient for things like satisfaction with an occurrence, so if like people have a doctor's visit, they might just get a survey at the end or like a phone call with Comcast or a survey that says, "How was that experience?" You only have the post-measure. People can use it, too, for knowledge after training. But even in that instance, having a pre- and post-measure would be better 'cause then you understand: well, what do people know before and then what did they know after? And so then you can kind of measure: what was that gain? So the pre/post-measures you're collecting at the beginning to establish a baseline and then at the end. And that's useful for, obviously, change over time. In our programs, what was the annual income coming in and what was income when they left? Did that change? For time series, it's just repeated measures multiple times. So we have certain information that we are collecting on a monthly basis to track, observe how things change just on a month-by-month basis. And then even stronger, so this is kind of moving towards a stronger design, is having a comparison group. And so you could look at the skill level pre- and post- of those who complete a workshop versus those who didn't do a workshop. Or like those who were in the program versus those who weren't or were in a different program. And the best, which is often hard to do in our field, is if you can randomly assign people to participate. Then you can really make a stronger assumption that the outcomes that you see are attributable to the program that you performed if you have randomized people into the groups. But anyway that, we can talk a lot more about that if people wanted to, about the actual design of the data collection.

And then there are procedures to think about, such as: Who will be actually collecting the data? How will they be trained? Who will be monitoring that data collection? How will you prepare your participants or clients for data collection so that, first, they know what's happening and so that they understand its importance and its intended use and let them see its value? And making sure that they know that their confidentiality is ensured, and how will you be doing that? So thinking of those kinds of things. And also how are you going to ensure quality of the data? So that might involve auditing it through doing some spot checking, perhaps doing double entry and making sure that things are lined up. Using automation is a nice way; it's a very simple way to ensure quality. So you have a drop-down menu of limited options, so people can only enter at least the options that are possible. And you might want to format databases to accept only certain numbers, things like that, to keep the quality strong. And then I'm not going to go into data analysis, 'cause again, that's a whole other thing. But just to say that it's about looking at the information that you've collected and asking yourself what it all means. In that process, you're saying: hey, what is all this? And once you have the data, it's really up to you to make use of it to inform the decisions about your program. And there's lots of ways you can piece it apart and sort of

subdivide it to look at certain things by different groups and look at relationships between things. And you can answer a lot of questions in this phase.

So what are the main... I guess now turning to the main piece that I wanted to get into and specifically talking about the stuff that we do here around: How do you communicate the results and reflect on the learning and use it to kind of infuse the organization with a culture of data and a culture of continuous improvement? So what I have for the next bit of the presentation is really just some examples, and I'm going to talk about how we've been here. This is not to say this is the best way to do it, but just sort of going off the point to show some examples of the work. So this is just a snippet of one of our quarterly reports for one of our programs. On an annual basis, we hold target-setting meetings with all programs. We have 11 programs right now. And in those meetings we'll have a target-setting and also sort of a strategy review meeting, a reflection on the whole year and a looking towards the year ahead. We will do a SWOT analysis, and we'll review strategies that we'll need to achieve the targets. And then on a quarterly basis, so every three months, we're meeting... again, the data team meets with each program and ideally with everybody on the team. So you have the staff and the managers. And we'll use that to, first of all, each quarter check in on the numbers, so this is like another way of auditing it. We do monthly audits, so we have that process happening on an ongoing basis, but then when we're gathering the quarter-by-quarter data, we'll still meet and say: Does this look right? And often people, they're so in their work, they're like, "No, I know that so and so just graduated, so that number should be here." So we do just like some checking on the numbers, but also really we're trying to understand patterns that we're seeing. We're trying to highlight successes and things that we've seen improvement on, and also highlight areas that may have been neglected. We maybe need to focus more in understanding the trends and understanding maybe potential outliers and gaining a sense of the context around these numbers, too, and where we may want to focus. And then from that, we'll do that program by program and then pull together sort of a summary of all the programs. And often you'll see that the pattern—you know, it's not just one program that is struggling with savings, you see that across the board. Or you may see from these means that most of the programs are struggling with, let's say, the savings target, to meet the savings target. But one or two programs was struggling, and now they're doing better. And you know, this stuff gets highlighted when you're comparing and you're pulling together these reports. And so then you can say: What's going on? What's going on in this program? What has been working here? And we'll try to pull together learning teams around that. So that if a new strategy had been used or something, some tool or some activity that was successful or maybe just a way of doing practice, that can be then shared across the organization so that we're not all just these separate programs. 'Cause actually several of them are in separate physical spaces, but that we are still reaching out and learning across that divide about what's working and then what practices we can use across programs. And these quarterly reports, we also then meet. We pull together an executive summary and meet with the executive team to review this, too, so that the whole organization and then the reports go out across the organization. So they kind of get a sense not just of what's happening in their program, but what's happening organization-wide and how they fit into that picture.

So that's one learning table, and as you can see, I don't think I have the ability to point or highlight anything. Okay, well, anyway, so this report also has some target-setting and comparison to the previous fiscal year. So this is our FY18 report and we have a column at the end, on the right, that has the FY17 numbers. And then we have quarter by quarter, so you can see if there's changes over a quarter. And then the year-to-date kind of is just keeping tabs on what's happening across that whole year and how does that year look in comparison to the targets. Do we meet the target? Did we get close and maybe we're in the range, or did we not? And also, how did that look, what we achieved this year in comparison to last year? Are there areas where we really saw huge improvements, like one of the bottom ones? Somewhere we actually got a bit lower. So we'll review all of those things in our regular meetings.

Another way of reflecting on the data is looking at, again, just a different way of visualizing it on what the targets were and what the actual outcomes were and how that changed over time. So is this is showing, first: Are we getting better at setting targets? And are we seeing any trends or patterns in our results? Sometimes you might see in these cases, especially if it's just sort of like, "Oh, it's fluctuating a bit." In other... and this is just one example that I pulled and this is actually just three outcomes pulled from that, but in other cases we're

seeing like a steady improvement over time or sometime you might see a dip a certain year and going up. But all these things are used for sparking conversation around what can explain the trends and what can explain the things, the anomalies. And what can we learn from that? And in addition to trying to improve the work and the outcomes, also can we improve the way, what we're collecting, how we're showing it, the process, the way that we're doing measurement? We're looking always to tweak that. And even our report, so this one back here, we've tweaked this to each year we're kind of trying to get better at the way that we do this work as well. So we're always getting feedback to try to improve on all of those levels that I mentioned.

Then another way of... Oh, I should say this was just in the quarterly one so we'll also put out reports or data that are broader and that we'll put out on an annual basis. It says what has happened over this year and how does that look compared to other years. And then data can also be used for helping the work of our staff and employees in understanding their caseload, or understanding their employees' workflow so that they can help them manage their caseload, but also improve where they need to. So the top row that is a little hard to read is just a small bit we pulled from a client management report, and it's at the level of a program. It says, how many households are there, how many of those households, how many people—in our case, we're interested in that we do Bridges—so how many people have had a Bridge and then highlighting how many people have not been Bridged. The next one that got cut off is how many participants are missing an entry assessment. And then it goes on and on to show how many people have currently active goals, how many are missing. And it's just a way to highlight, rather than having to keep track case by case and checking on everything, you can get this summary that says, "Okay, we have this many people, but we're missing a few here." And then you can click on that in these reports, click in and say: Who are they? And then do some follow up. We've also created reports that would indicate for staff the days since last contact with someone and then they can sort that column if they're thinking who to reach out to. We can sort by the people who it's been the longest with and they might say, "Oh gosh, it's been three months since I connected with this person and I will start here in my work." And we have heard really positive feedback from staff saying it helps them to manage their work and see where they need to be doing other things. And then also it's useful then, or can be useful, to see kind of tracking the activities that are going on. And do those aligned with the outcomes that we're seeing? And especially if you're interested in looking up by like program or even by staff, like do the activities that certain staff members are doing align with different outcomes for their caseload? And obviously, so it's going to be complicated because you don't necessarily just get a randomly distributed caseload with demographics and various people come in. Oh, I guess I should kind of say here, especially in this section when you're thinking of looking at a particular, maybe even individual, staff members is that it's so important not to use the data to judge or punish, or even to like rank people against each other, because it's really essential for learning, improving, and encouraging and celebrating. And it's hard to do that because I think it's just by nature, I think, the way we grow up, we get grades all the time, which do say, "Okay, you're good at this or you're not." And so I feel that sense from people sometimes when we look at reports they might say, "Oh well, this should be higher, or this should look better." But we try as much as possible to say: This is not to say "this is bad" and we are giving you a report card, but what can we learn from this and to ultimately just do the work better and improve, or even just understand the work better. So that's always a struggle. Because I think inherent in reports and numbers is a little bit of the feeling of being evaluated.

This second chart below here that is—you see it with all these colored spikes. I crossed out participant—or not participant, excuse me—staff names, but that's an example that a staff manager could look at, what activity is happening across her or his department by staff. So this is one example. This particular example is looking at... I believe this is looking at goals set by an area in the pillars. So we have like: was it an education goal? Was it a well-being goal? Was it a financial goal? And you can see here that there's certain people who are much more likely to set one type of a goal, and actually it nicely aligns with their expertise in this case. But also seeing where there's been low activity and where there's been a lot of activity. And this can be very useful for managers, too, if they're doing reviews with their team and to have meetings with them to check in to understand what's going on, and to then also share if something's working well with one person, in the same way I mentioned earlier on if something is working well in one program, we can share that with other programs. If something's working well with a particular mentor or manager or staff member, can that be...you know, what's going on? And can that be shared with other people? So there are just other ways of using the data to

understand the work and ultimately with the goal of linking it with outcomes and improving the outcomes for the participants or achieving the goals that you are hoping to achieve.

And then speaking of using the data to encourage and celebrate, one thing that we do annually is... it's usually during our Thanksgiving, we have monthly all staff meetings, and during one that happens at Thanksgiving we present what we have called "bragging boards." And it's a chance for each program to highlight the three statistics that they were most, or three outcomes, that they were most proud of over the previous year. This is actually an old one; we've changed them a bit. And in this short period of time, they present to the whole staff. They have their board. They say what went into getting these numbers, like the work that they had to do, why they're proud of them. They talk about who they're thankful for, and it's a very nice way of showing the connections across the programs and the organization. Who made this work possible? And then what they're focusing on for the next year, striving on for the next year. So even though we're not showing everything and it really is specifically around just showing the good stuff here, it also has the same spirit to it of: you're reflecting, you're showing the gratitude, and you're also looking forward and thinking of strategies for the next year. So similar to our reflection meetings that we have with the teams. And then from there... and these are really, really lovely meetings. And then from there, so each program will get a physical board to put at their center. And then it's at our main administrative offices we have another copy that we put up. And we kind of just plaster the walls with them for the year. And so this is a way of infusing... the environment gets infused with data and with outcomes, and it helps to change the culture that we are an organization that looks at outcomes and focuses on them and celebrates them. And this also leads to when we have people visit, too, it just leads to conversations.

So another way to report is in the qualitative way in telling personal stories. And this also follows from... this is celebrating the successes and even more so really around promoting a growth mindset and high expectations. We try to saturate messages of counternarrative. In the populations that we're serving there are a lot of negative stereotypes and biases. And so as much as possible, we want to show that other story and present that counternarrative that people get faced with a lot. So we can do it in newsletters, success blasts that we email out across organization, reports, media. Like one of them is a newspaper story and social media. And these ones that are featured here are of clients or participants, but you can also do this, and we also do this, at the level of staff and even at organizational successes. One thing that we have is High Five, this big, very silly-looking blue mitt you give someone a physical high five with, and it's for when we notice something impressive that another staff has done. And that's a way of publicly acknowledging and celebrating that work.

And then another one of my favorites of getting that out is I'm changing how people are thinking around data as just being okay now we're evaluating and looking at numbers. We just weekly, by email to the organization across the organization, send out Stat Attacks. And we have a mascot, this little data cat who has become our data team's mascot that we just use with our emails and various things to make things more fun. And we try to also, or we have lately been trying to make the stats that we send out fit with what's going on. So this one here about moving, we put out that first week of September. We're in Boston. I don't know what city everyone is calling from, but in Boston everybody... that is just that the whole city moves. And so we thought, "Oh, let's put out a stat about what movement is happening in our shelter programs, how many people are moving out of shelter into permanent housing." And we just provide this little bit of information. This one is in May when everyone, a lot of people are graduating. We have a ton of schools here in Boston and we put out a Stat Attack around what is going on in terms of education and training programs and our participants, how many were enrolled, and how many people were graduating. And here's a third example. I just like these factoids, threw on three of them. This one was over the summer. We pulled out... and this is interesting, 'cause this is not even something that's one of our outcomes. It's not something we really tracked, but we had this data on how many kids we enrolled in summer camp programs. So these Stat Attacks, we also are increasingly been trying to get... just generate discussion with them. So sometimes we'll put out a little interesting one and then say... ask a follow up question like: Okay, this percent of people enrolled in education. And next week, guess how many people graduated? Or something like that so that we get people writing back. And then we'll do a raffle to get winners. So it's just a way of getting engagement around and making these stats more fun, making data playful and fun and also interesting to everyone.

And then this... all that the last few slides have been talking about is really ways of enhancing a data culture of an organization, which is so important for when you're wanting to be collecting data and doing outcomes measurement, to have that support and environment that makes that work easier. So I just will end with a couple of slides about data culture and then we'd be happy to talk about any of this stuff.

So one plan of a data-positive organization exists where people believe that good information is important enough to warrant the resources needed to produce it. A data-positive organization is one that relies on data to make decisions and strategic organizational change. And it uses data in every facet of the organization, and it encourages and celebrates data collection analysis for internal, so institutional knowledge as well as external use. So there might be more on marketing or sending out to funders or promoting the work that's being done. And to enhance a data culture it requires prioritizing and investing in data collection, data management, and analysis/knowledge production. Encouraging staff to access and derive insight from the data, so that there's data literacy across the whole organization. It's not just the IT team or the evaluation staff who have the access to the data and can say: "Oh, here's what I'm learning, here's what I'm seeing." But really it's something that's shared. It's something that's brought to the table and getting perspectives from people who are on the front lines doing the work and from people who are looking across the programs and seeing patterns like that. You really want the data literacy and the input and feedback and the reflection on it to happen across the whole organization. And the informed cultures are also those that have conscious use of assessment, revision, and learning built into the way that they plan, manage, and operate. So from the leadership team, the strategy planning to the decision making, to meetings, even to job descriptions, a data-informed culture has continuous improvement embedded into the way it functions. You're using data to solve problems, make decisions, tell stories as I've been kind of talking about throughout, continuously improve.

Okay, so that concludes the presentation. It's a little odd just talking to a computer. I don't know if people are still here. Oh, I see that there's a highlight on the Q and A section. So I'm going to click on this and see what I see. Okay, hold on a minute. Okay, hold on, only part of this is showing up for me. So I do see a question here. Tina, I'm not sure if you can see the full question. I'm only seeing one line. Maybe... oh, here we go.

TINA: Yeah, it's how it's played out. But I can read it for you. I see the whole entire question.

ASHLEY: Oh, okay. I see it now.

TINA: You do? Okay.

ASHLEY: I see it now. So okay, the question is: How do you balance the amount of data you collect, what your funders require you to collect, versus what you're interested in knowing? So that's a good question and a challenge. I guess what we... and it is kind of a balancing act a bit. What we try to do here, so starting at the beginning to the extent that we can, we will kind of try to supply the information that we want funders to ask for to them. So if, for example, if we're wanting funding for a certain project and we know that the funder will want to know employment outcomes, they might not specify how to get that. And so we can say, well... so kind of like when we look back at the outcomes and then the indicators, we try to say, "Well, this is how we can indicate that we are having the outcome you're hoping for." And so we can align so that we're showing the outcome or the impact that a funder might want to see, but we're using indicators that we are already collecting for our participants. We can say, "Well, we can show you this, this, and this to show this idea." But in some cases we will have funders who say, "We want to know this specific thing measured in this specific way." So sometimes you just have to do that, because it is important to get funding. But it's also what we'll do on an annual basis is review all of the measures that we want that we're interested in, what we're collecting, and see where that lines up with things that are required. And so one big example for all of our shelter housing programs, we have required information that we have to get in to DC in a particular system in the particular way. We have our own system for collecting and managing our data, and sometimes what they want, they change it annually, they tweak it a little. And so it ends up being different than what we are asking. But we'll, each year, we'll look at the two and say, "Okay, we're basically getting at the same thing. We aren't able to change what they want, but we can change how we're doing it." So we always try to, on an annual basis, 'cause if we did it more regularly it would be too much, but on an annual basis align what we're collecting with

what we have to be, whether it's for a contract or for a funding requirement. So that's another way to kind of balance it, if you can, to the extent you can and... yeah, I hope that starts to answer your question, I think. And also I guess ideally you have the alignment in where you're seeking the funding and the types of programs you're doing. So if you would want to get funding for a program, you'd probably be interested in the outcomes that a funder who's funding your program would be interested in, too. So there's alignment there, you hope, that you're interested in knowing, at least similar things to what they are interested in. Let's see... oh okay, I see that there's... okay. Do we have time for another question, Tina? I think we have...

TINA: Yes, it would help me to expand these screens so it doesn't mush the question. But I had another question. It says, "Can you suggest a way to start a robust data collection program slowly?"

ASHLEY: Okay, let's see. So I guess it depends where you're starting from. I think for starting slowly... If you go back, I'm thinking of just at the very beginning. Starting slowly, starting with a small, really starting with: What do I really want to know? What would those key metrics be? And starting with a small set of precise key measures is a good starting place. So we work with a lot of organizations around the US and actually internationally, too, and some are... they're partnering with us and they want to be collecting more data, but they are very small. And so we're fortunate to have a research team and a data team. Some of the organizations are... they don't have that capacity and they are so wanting, though, to collect this. So in that case we talk about how you share that work and share that burden in a way. But even in our team, we have our own staff who are working with... they're collecting the data and they're entering their own data. So each person is responsible for that. Where we can and where we have the capacity, an administrative assistant can help take some of that off by doing the data entry part or maybe some of the data cleaning part. So to the extent that you can kind of not put it all on one person if you don't have that person and sharing that work is a way to start slow. And you don't say, "We're going to now all of a sudden collect everything and look at everything all the time and all the ways." You say, "We'll start here and we'll start with a basic maybe pre- and post- on these 10 key measures that will show us what we're hoping to see." And as you start that way, you can start to build and kind of build in some of those muscles, too.

I think aligned with the previous question around funding, you know, that might be a place to start 'cause it might be that through the funding you might have more capacity to do the work, and it's very important that you get those questions answered. So you might want to know, just start with the measures that a funder is interested in and think about how can you do that in the simplest, most straightforward way. Or another way of focusing might be if you're making a change or implementing a new program you just focus there. And you could also think about piloting where it's possible. So you might not do the assessment with all programs, all participants. You might start with one. I don't know if this is someone... you're having tons of programs or maybe you just have one, but you might not even start with everybody. You pilot, you will test out some of the measures and see how that goes, and in that process saying: How long did it actually take to conduct this? Like how much time did it take of the participant? How much extra time of the staff, of the mentor? Then when you test it out in a small way you can see how you could scale out across the rest of the program or other programs in the organization. And you also will sort of build out—okay, now that you have an accurate sense of the resources that you need to do that in a smaller way. So some of our new measures—'cause I feel that we're sort of... some people feel they're at capacity—for some of our new measures, that's how we do it. We'll just pilot it in a program that does have a little more capacity. They have a bit more time, maybe lower caseloads, and we'll test it out there, see how it's working, and then expand from there, especially if you start to see promising results and find a way to make it help the work, then that can be a good way to start. Yeah. Are there any other questions?

TINA: I don't see any other questions in the Q and A box. And again, if you all would like to use the Raise Your Hand option, it's located on the right side of the screen. And we can unmute you, and you can verbally ask what your question is so Ms. Winning can answer it. If not, we do still have a Q and A box for those who may be shy or have earbuds in and can't verbally speak. So yeah, we still have options available for those who want to have a question answered.

ASHLEY: I see a question on staff resistance. How do you deal with staff who are resistant to collecting or considering data? I think for this, it's... well, I think a lot of things about this. One key thing is relationship building. It's really all about relationship building. So when there's resistance, which there often is, especially if it's a new thing that you're implementing, if you're starting to just collect data where you haven't before, or even if you've been collecting for a long time and you're wanting to collect it more or in a different way, there's often resistance. And it's important to think about why and where that comes from, and usually it's some kind of fear. Either fear of having not enough time and being totally overwhelmed/overburdened already. Or maybe it could be fear of not knowing, thinking you don't know how to do it or how it might work. Or some of the fears around data that we talked about earlier around judgment. Maybe the burden on clients. So in talking with staff, understanding why they have a concern.

So just recently where I'm getting a little bit of, I wouldn't call it resistance, but a little pushback on trying to add a new measure and even though it's a measure, I'm thinking about what can it be for and I'm listening: well, what is the concern here? And they had some really great, valid concerns. And so it's important to listen to that. Also, the other thing we try to do is to make things as easy as possible. So we won't put... say "Okay, we want to do this and you're going to need to do this and you're going to need to do this and there it is." We would try to automate as much as possible and make it the simplest way possible. But that involves talking about it and relationship building. And I think when there's resistance it can also come from having people feel like it's being pushed on them. So what we try to do a lot is integrate all staff into that decision. We'll do a sort of... if I'm interested in something new, I'll sort of preview and give a heads up and look for the champions in the programs who... there are some people who are really into data collection. And they're like, yes, let's do it, let's get more. So finding those people so they can really then share it with their teams and get people onboard and get excited with them, but including people in the process, including their input to say: "We're thinking of collecting data. How would that work for you? What challenges would that create? How could we alleviate some of those challenges?" All that involvement in the process will make the team, make the staff feel like they're not having something imposed on them. They're a part of something and they got to shape it. And I think really importantly is showing and explaining and getting excitement around and showing how it's why we're doing it. If you just throw out a measure and say, "Now you have to collect this. The end." Then there should be resistance. But if you are saying, "We think that the work you're doing is having this impact that we aren't yet able to capture and we think this is a way of capturing it. And here's why and here's the literature around it and this is why it's important or could be useful and/or... and this is how it can help you do your work differently or better, and this is what your participant or client might learn from this experience." All of that really integrates it into their world and, I think, lessens the resistance. It makes it feel like, "This is a worthwhile use of my time."

And aligning with the other question: and starting it slowly and doing it pilotingly, that can be a great way too. You can do it in one program and say, "Wow, look what we learned here." And then other people might say, "I want to capture that, too." And what we've found over time is where we used to get resistance, now we're starting to see staff saying, "I don't think you're collecting this, right? Can you... I think you should be looking at this." And we're like, "That means you have to collect and enter more data." So we're getting the request from the other side because of people seeing its value and being able to do the work. And I guess another thing I'll say is whenever we try to add work collecting data, we will also in that annual review say what haven't we been using, we collected and we didn't do anything with it or it didn't show us anything interesting, or we're not getting accurate feedback so we can't use... it's not good quality data. We'll cut that out and replace it with something that we can use better, so that we're trying to at least set balance... balance it out so it's not just add more, more, more, more. 'Cause that will be overwhelming.

Yeah, okay. Okay, so thank you. Are there any other... does anyone else have anything they want to say? I believe I have a time set for if people do have follow-up questions, but if anyone has anything... Oh, and maybe I can move to my last slide here. If you do want any other information, or to continue the conversation, feel free to contact me and my email address is there. Tina, is there anything else?

TINA: No, I don't see anyone in the queue for questions, and there are no more Q and A questions in the box.

ASHLEY: Okay.

TINA: If you don't have any additional questions, I will end the call and thank you all for joining today's webinar. We appreciate your time and attention, and if you have any questions related to the presentation, please submit them to your program administrator or to Ms. Winning. And her contact information is here on the screen if you would like to have that for your records. And thank you again and have a great day, everyone.

ASHLEY: Thank you. Happy weekend.