



Using Data To Improve and Show Program Performance

August 1, 2012



Agenda

- Program Sustainability
- Overview of Terms
- Activity 1
- Measures/Indicators
- Activity 2
- Making Data Actionable
- Next Steps



Poll: How have you used your logic model?

- Program planning and design
- Communication tool
- Management tool
- All of the above

Program Sustainability



Program Sustainability

- **Logic Model**
 - Communication
 - Implementation
 - Management
- **Buy-in from stakeholders**
 - Program Support
 - Funding
- **Performance Questions**
 - Assess progress/accomplishments of various aspects of a program



Overview of Terms



Overview of Performance Terms

- **Activities**

The processes, tools, events, technology, and actions that are an intentional part of the program implementation.

- **Goal**

A broad statement of a long-term results needed to accomplish the program's mission and achieve its vision

- **Indicator**

A meaningful measure used to determine performance or change



Overview of Performance Terms

- **Objectives**

A description of results that, when achieved, move a program toward its stated goals

- **Outcomes**

Benefits of program activities to clients.
Accomplishing goals and objectives.

- **Target**

A specific level of performance the program is
striving to achieve



Activity 1: Is it a measure?

Below is one of the 2012 goals for the State of Wisconsin:

Increase car ownership opportunities

Are these measures?

- An additional 500 people below the poverty line will become car owners
- The average down payment will be decreased by 2014
- The share of government assisted car loans for first time car owners remain 50% in each through 2015
- Between 2010-2012, approximately 5,000 applications have been submitted
- Number of car dealerships serving people below the poverty line



The Connecting the Performance Terms

| Term | Example |
|------------|--|
| Goal | Increase well-being and work responsibility of clients |
| Objective | Promote economic self sufficiency |
| Outcome | Increase client's employment skills |
| Indicator | Number of clients with new or revised resumes |
| Target | 100% of clients with new or revised within a month of enrollment |
| Activities | <ul style="list-style-type: none">•Resume writing workshops – Twice a week•Resume review with job counselor |



Measures



Measure: Types

| Type | Description | Example |
|---------------------------------|---|--|
| Input Measure | A measure of resources used | Application received Staff hours used |
| Activity/Process Measure | Describe aspects of the program activities | Days to reach participants |
| Output Measure | The number of units of services provided or delivered | Eligibility assessments conducted |
| Outcome Measure | Measures of ultimate benefits associated with the program | Reduction in government assistance |

Developing the Measures

- Identify potential measures
- Assess each measure
- Choose the best measures
- Refine measures

Measures: Formatting

| The Unit | The What | Timeline |
|-------------------|-------------------------------------|------------------------------|
| Percentage of | Clients employed | Within 30 days of completion |
| Average number of | Days it takes to approve a car loan | Per quarter |

Measures: Tips

- **Separate measures from targets**

Combined: % of transportation related work absences decrease by 20% every year

Separated:

- Measure: % of transportation related work absences/year
- Target: 20% reduction/year for 2012-2014

- **Avoid starting measures with a verb**

- **Measures usually start with:**

- Number of...
- Percentage of...
- Rate of...
- Average of...



Activity 2: Effective measure

Let's brainstorm criteria for an effective measure



Measures: Characteristics

- **Relevant:** Clearly relate to the activity being measured
- **Understandable:** Easy for everyone to comprehend
- **Timely:** Information available when you need it
- **Comparable:** Enough data to tell if program is improving
- **Reliable:** An accurate representation of what its intended to be
- **Cost Effective:** Within the time and resources available



Making Data Actionable



Performance Plan

- How will data be collected?
- Who will use the data?
- How will data be used?
- How will data be made available to key stakeholders?
- How will data be incorporated into day-to-day management?
- What is the process of modifying measures and/or goals as they are met?



Performance Plan Sample Template

| Outcome | Measure | Target | Baseline | Data Collection Method | Data Collection Frequency | Report Due To: | Staff Responsible |
|-------------------------------------|--|-------------------------------------|---|------------------------|---------------------------|-----------------------------|----------------------------|
| Clients improve their employability | #/% of clients who gained employment per quarter | 10% of clients employed per quarter | # of clients employed at the beginning of the program | Exit survey | Quarterly | John Smith, Program Manager | Jane Brown, Job Specialist |
| | | | | | | | |



LINCWorks Case Manager Client Tracking Sheet

| LINCWORKS TRACKING FORM | | | Participation Hours | | | | | | | Reporting Month: June 2012 | | | | | | |
|-------------------------|---------------------------|---------------------|----------------------|----------------------|----------------------|----------------------|------------------|-----------------------|-------------------------|----------------------------------|-------------------------|-------------------|-----------------------|---------------|------------------|----------------------------|
| Participant Name | Assessment Completed Date | Required # of Hours | Week ending 06/01/12 | Week ending 06/08/12 | Week ending 06/15/12 | Week ending 06/22/12 | Nothing Required | Job Search Start Date | Primary CWA | Secondary CWA | State Call-in Letter #1 | Conciliation Date | Referred for Sanction | Sanction Date | Cash Closed Date | Status |
| ##### | 07/05/12 | 20 | | | | | | | | | 05/31/12 | 06/14/12 | | | | Conciliation - 10-day |
| ##### | 05/30/12 | 20 | 27 | 34 | 0 | 0 | 0 | | Vocational E | Community S | 04/25/12 | 05/30/12 | | | | Conciliation - 10-day |
| ##### | 06/13/12 | 20 | 0 | 0 | 0 | 0 | 0 | | Community Vocational Ec | | 05/09/12 | 07/03/12 | | | | Conciliation - 10-day |
| ##### | | 20 | 0 | 0 | 0 | 0 | 0 | | | | 06/16/12 | 07/03/12 | | | | Conciliation - 10-day |
| ##### | 11/18/11 | 30 | 35 | 35 | 35 | 35 | 35 | | CWEP | On-the-Job Training | | 05/11/12 | 06/26/12 | | | Referred Sanction - 10-day |
| ##### | 06/13/12 | 35 | 0 | 0 | 0 | 0 | 0 | | Vocational T | Job Search | | | | 03/03/10 | | Sanction - 90-day |
| ##### | | 35 | 0 | 0 | 0 | 0 | 0 | | | | 05/06/11 | 05/19/11 | 06/06/11 | 06/06/11 | | Sanction - 90-day |
| ##### | 03/14/12 | 35 | 0 | 0 | 0 | 0 | 0 | | Vocational E | Job Search | 02/07/12 | | | | | Active |
| ##### | 09/13/11 | 20 | 27 | 27 | 27 | 27 | 0 | | Unsubsidiz | CWEP | | | | | | Active |
| ##### | 05/02/12 | 20 | 0 | 0 | 0 | 0 | 0 | | CWEP | Vocational Ec | 03/15/12 | | | | | Active |
| ##### | 12/02/11 | 20 | 30 | 42 | 42 | 30 | 30 | 10/03/11 | Subsidized | HS-GED | | | | | | Active |
| ##### | 01/05/12 | | | | | | | | | | 10/27/11 | | | | | Active |
| ##### | 10/14/11 | 20 | 0 | 0 | 0 | 0 | 0 | 06/30/12 | Job Search | CWEP | 03/31/11 | | | | | Active |
| ##### | 03/08/12 | 20 | 34 | 34 | 42 | 50 | 34 | | Unsubsidiz | Job Skills Related to Employment | | | | | | Active |
| ##### | 04/25/12 | 35 | 35 | 35 | 35 | 35 | 35 | 04/28/12 | Job Search | Unsubsidizec | 01/12/12 | | | | | Active |
| ##### | 04/25/12 | 20 | 0 | 0 | 0 | 0 | 0 | | Community | Job Search | | | | | | Active |
| ##### | 09/28/11 | 20 | 20 | 15 | 0 | 0 | 0 | | Job Search | Community S | 09/28/11 | | | | | Active |
| ##### | 04/10/12 | | | | | | | | | | 03/13/12 | | | | 06/01/12 | Pending Closed |
| ##### | 04/06/12 | 0 | | | | | | | | | 03/13/12 | | | | 06/01/12 | Pending Closed |
| ##### | 03/21/12 | 20 | 0 | 0 | 0 | 0 | 0 | | Vocational E | Job Search | 03/07/12 | 04/23/12 | 05/23/12 | 06/07/12 | | Sanction |
| ##### | 06/28/11 | 20 | 14 | 30 | 31 | 31 | 31 | 07/02/11 | Unsubsidiz | Education Directly Relate | 05/11/12 | 05/30/12 | 06/13/12 | | | Sanction |
| ##### | 01/11/12 | 30 | 0 | 0 | 0 | 0 | 0 | | CWEP | Job Search | 12/29/11 | 04/23/12 | 05/23/12 | 06/07/12 | | Sanction |
| ##### | 03/13/12 | 30 | 0 | 0 | 0 | 0 | 0 | 03/31/12 | Job Search | Community S | 04/23/11 | 04/23/12 | 05/07/12 | 05/23/12 | | Sanction |
| ##### | 03/07/12 | 30 | 52 | 30 | 29 | 16 | 16 | 03/15/13 | Unsubsidiz | Job Skills Re | 02/15/12 | | | | 06/30/12 | TEB |
| ##### | 03/07/12 | 30 | 30 | 30 | 30 | 30 | 30 | 03/10/12 | Job Search | Job Skills Re | 01/27/12 | | | | 06/30/12 | TEB |

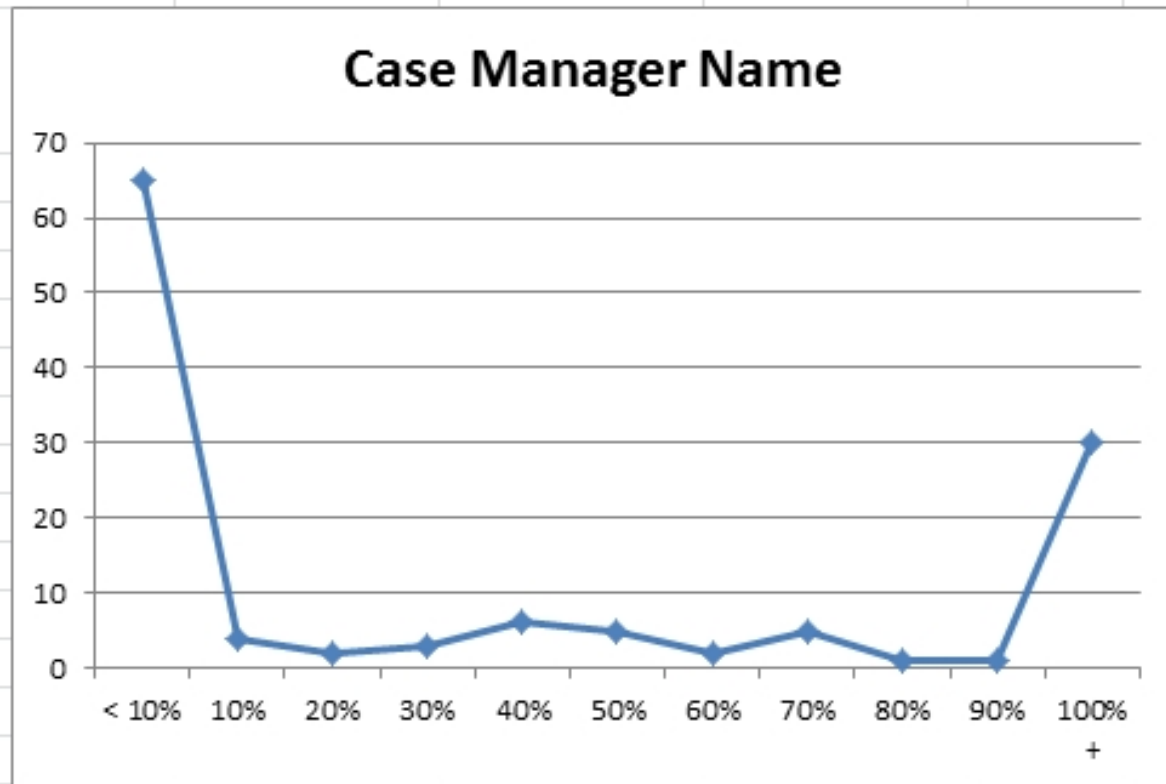


Useful and Usable Performance Report

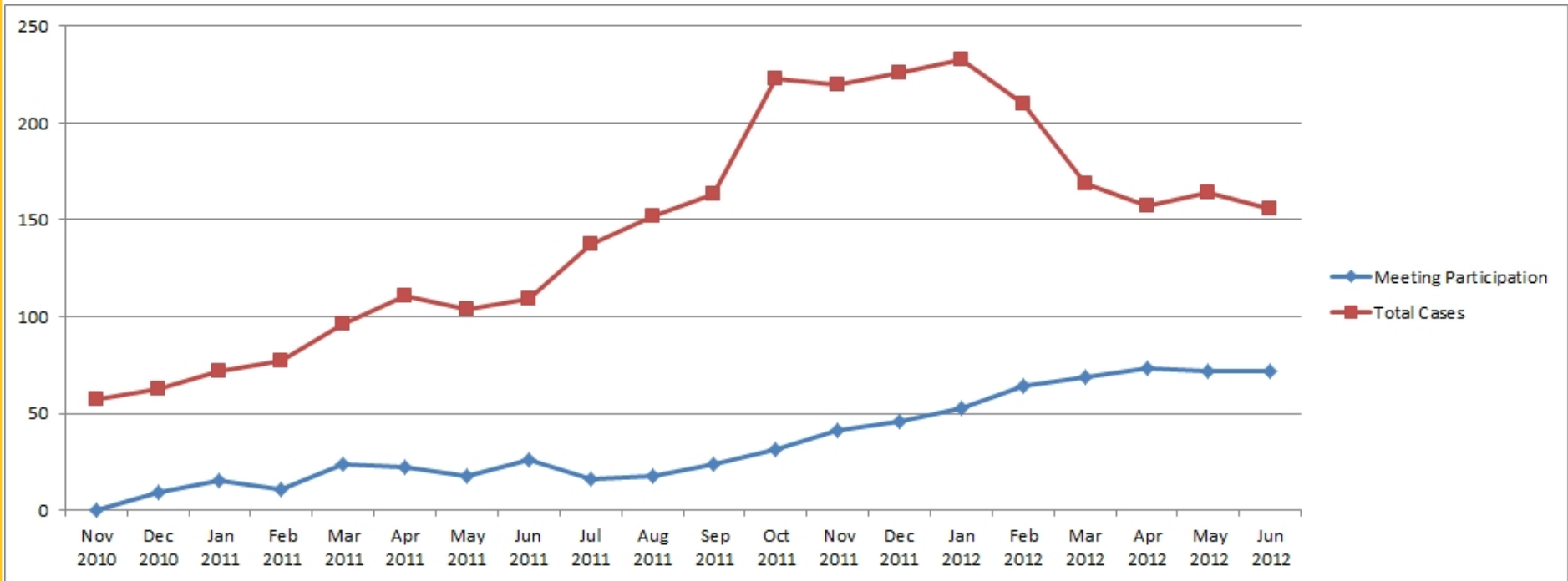
- Graphs
 - Line graphs
 - Bar graphs
 - Pareto graphs
- Context and Background
 - Report should not include only measures
- Performance Reporting Process
 - Frequency

LINCWorks Case Manager Inactive Client View

| Participation % | Case Manager Name |
|----------------------|-------------------|
| < 10% | 65 |
| 10% | 4 |
| 20% | 2 |
| 30% | 3 |
| 40% | 6 |
| 50% | 5 |
| 60% | 2 |
| 70% | 5 |
| 80% | 1 |
| 90% | 1 |
| 100% + | 30 |
| Total w/Hours | 59 |
| Cases | 124 |



LINCWorks Case Manager Performance Graph



Interpreting Measures To Improve Performance

- Guiding Questions
 - What caused the observed performance?
 - To who?
- Performance targets
- Group measures
 - By domain
 - By population
 - By activities
- Decision making process
 - Improvement strategies



LINCWorks Case Manager Client Tracking Sheet

| Agency / Case Manager | Number of Clients | Percent Meeting Rate | Number Meeting Rate | Percent Meeting Rate Including TEB | Number Meeting Rate Including TEB | Partially Meeting Rate | No Work Entered | Sanctioned | Conciliation | Closed with Employment | Closed |
|-----------------------|-------------------|----------------------|---------------------|------------------------------------|-----------------------------------|------------------------|-----------------|------------|--------------|------------------------|-----------|
| LINC | 1905 | 19.63% | 374 | 26.88% | 512 | 153 | 1374 | 123 | 0 | 1 | 20 |
| Case Manager - 1 | 83 | 18.07% | 15 | 28.92% | 24 | 1 | 67 | 7 | 0 | 0 | 0 |
| Case Manager - 2 | 0 | 0.00% | 0 | 0.00% | 6 | 0 | 0 | 0 | 0 | 0 | 0 |
| Case Manager - 3 | 81 | 24.69% | 20 | 24.69% | 20 | 14 | 47 | 0 | 0 | 0 | 0 |
| Case Manager - 4 | 73 | 12.33% | 9 | 20.55% | 15 | 4 | 60 | 4 | 0 | 0 | 0 |
| Case Manager - 5 | 0 | 0.00% | 0 | 0.00% | 5 | 0 | 0 | 0 | 0 | 0 | 0 |
| Case Manager - 6 | 75 | 18.67% | 14 | 18.67% | 14 | 6 | 54 | 1 | 0 | 0 | 0 |
| Case Manager - 7 | 138 | 10.14% | 14 | 12.32% | 17 | 2 | 122 | 25 | 0 | 0 | 0 |
| Case Manager - 8 | 211 | 18.48% | 39 | 27.96% | 59 | 18 | 154 | 2 | 0 | 0 | 0 |
| Case Manager - 9 | 0 | 0.00% | 0 | 0.00% | 6 | 0 | 0 | 0 | 0 | 0 | 0 |
| Case Manager - 10 | 95 | 35.79% | 34 | 42.11% | 40 | 4 | 57 | 8 | 0 | 0 | 0 |
| Case Manager - 11 | 128 | 7.03% | 9 | 12.50% | 16 | 6 | 113 | 31 | 0 | 0 | 0 |
| Case Manager - 12 | 83 | 16.87% | 14 | 24.10% | 20 | 8 | 59 | 9 | 0 | 0 | 0 |
| Case Manager - 13 | 59 | 40.68% | 24 | 59.32% | 35 | 1 | 33 | 1 | 0 | 0 | 0 |
| Case Manager - 14 | 26 | 19.23% | 5 | 19.23% | 5 | 11 | 10 | 1 | 0 | 0 | 0 |
| Case Manager - 15 | 55 | 34.55% | 19 | 38.18% | 21 | 3 | 33 | 0 | 0 | 0 | 0 |
| Case Manager - 16 | 72 | 13.89% | 10 | 19.44% | 14 | 11 | 51 | 3 | 0 | 0 | 0 |
| Case Manager - 17 | 118 | 6.78% | 8 | 14.41% | 17 | 10 | 100 | 0 | 0 | 0 | 0 |
| Case Manager - 18 | 137 | 21.90% | 30 | 24.82% | 34 | 0 | 123 | 0 | 0 | 1 | 16 |
| Case Manager - 19 | 112 | 0.00% | 0 | 0.00% | 0 | 7 | 105 | 4 | 0 | 0 | 0 |
| Case Manager - 20 | 124 | 24.19% | 30 | 34.68% | 43 | 30 | 64 | 15 | 0 | 0 | 0 |
| Case Manager - 21 | 71 | 11.27% | 8 | 22.54% | 16 | 4 | 59 | 2 | 0 | 0 | 0 |
| Case Manager - 22 | 164 | 43.90% | 72 | 51.83% | 85 | 13 | 83 | 10 | 0 | 0 | 4 |



Questions

Next Steps

