



Real World Introduction to Outcomes Management

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Outcomes are Changes in People's Lives

- **Initial outcomes**

(direct result of program activities)

- new knowledge
- increased skills
- changed attitudes or values

- **Intermediate outcomes**

(significant milestone or graduation requirement)

- modified behavior

- **Long-term outcomes**

- improved condition
- altered status



Nonprofit Bottom Line

Our

Their

Outcomes = Profit



Workshop Agenda

- Define performance management (15 min)
- Role of mission statement in PM (10 min)
- Role of logic model in PM, criteria (15 min)
- Client data tracking systems (30 min)
- Your next steps (5 min)
- Total 75 min



Workshop Goals

- Understand elements of outcome management system
- Understand your organization's status and next steps in building outcome management system



Your Take-Aways Today

- Assessment of your agency's PM system
- Assessment of your mission statement
- Know how to assess a logic model
- One piece of mission-critical measurable outcomes data for your agency
- Assessment of your agency's data system
- Your action steps to strengthen PM in your agency



Four Assessments

- Benchmark Assessment Tool (PM)
- Mission Statement Assessment
- Logic Model Assessment
- Data System Assessment



Nonprofit Performance Management System

- Definition: What we do to ensure improved effectiveness, or measurable intermediate participant outcomes
- Answers these four questions:
 - What participant outcomes are we aiming for?
 - How well are we doing?
 - With whom must we partner?
 - How can we improve?



What Does an Effective Nonprofit Agency Look Like?

- **Improved participant outcomes**
- Use outcomes data to drive decision-making about programs, staff, partnerships and resources
- Measure and analyze outcomes



What does a useful Mission Statement look like?

- Tells why agency is in business; definition of success
 - Clear
 - Concise
 - Compelling
 - Concrete
- Should describe target population and outcome
- Example: “Beat Rome”



Role of Mission Statement in Outcomes Management

- Focuses agency resources on priority activities
- Guides staff to make strategic decisions
- Tells if we are successful or not
- How strong is your agency's mission statement?
- Take the Assessment for your agency
- 5 min



Benchmark Assessment Tool

- Purpose: help you build your performance management system from ground up
- 17 effectiveness practices
- Pre- and post-test
- Goal: level 4 practice
- General or youth program



Benchmark Assessment Tool

- Pair up with a colleague
- Take the Assessment for your agency
- 10 mins.
- Questions?



What is a Logic Model?

- One page conceptual map showing flow of influence
- Shows how program helps participants achieve outcomes
- Target population, inputs, activities, outputs, outcomes
- Outcome measurement plan (separate) to track only most important outcome



Role of Logic Model in Performance Management

- Identify specific target participant
- Clarify logical expected outcomes progression
- Clarify program strategy necessary to help participants reach outcomes
- Provide some indication that program provides realistic dosage and duration to lead to outcomes
- Help with program planning and/or improvement



Logic Model Criteria

1. Logical flow activities through outcomes?
2. Outcomes clearly benefits to participants?
3. Program accountable for initial & intermediate outcomes?
4. Longest term outcomes meaningful, influenced by program?
5. Appropriate stakeholders included?
6. Inputs, activities, outputs, outcomes are clear, comprehensive, and detailed?



Outcome Measurement Plan

- Select most important outcome to measure
- Identify indicators to signal outcome has been achieved
- Select/create measurement tool and data collection process

Modern Client Tracking Systems





What does an effective Client Tracking System look like?

- Intake
- Enroll
- Manage
- Assess
- Report

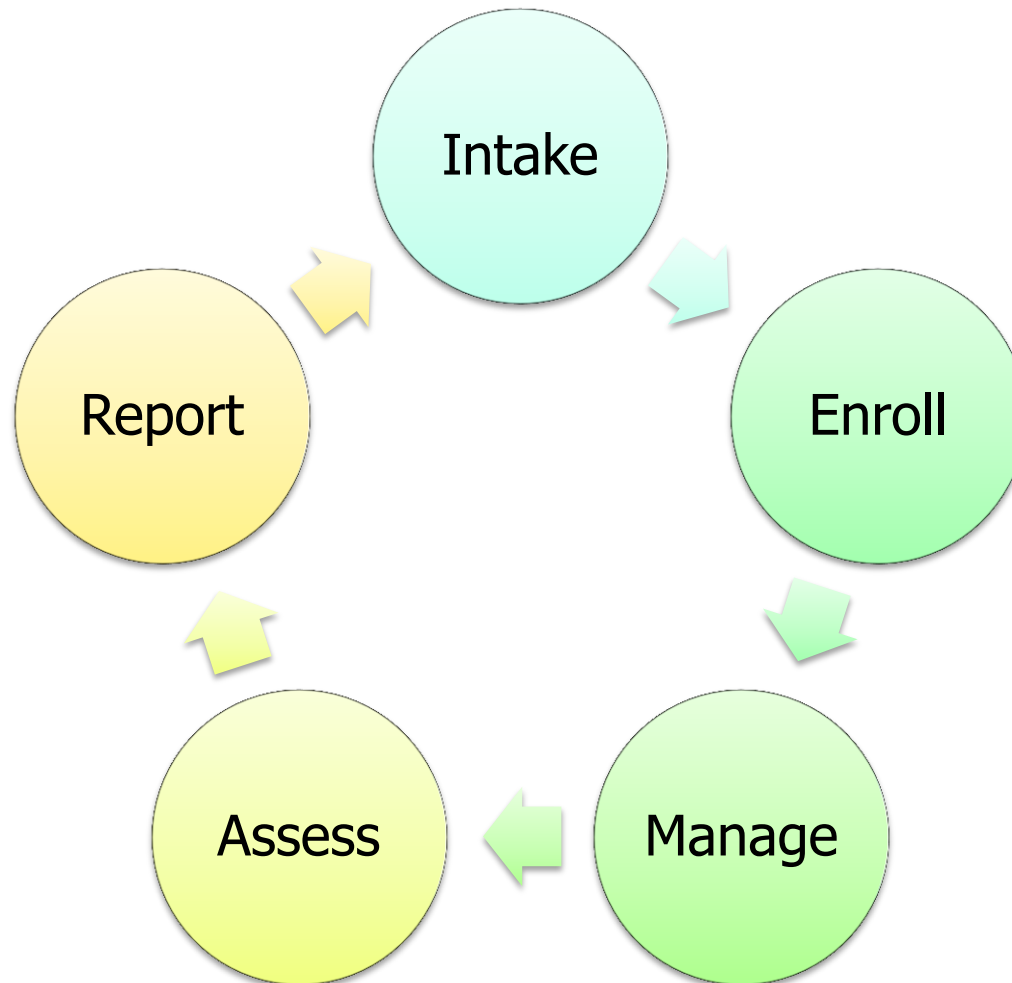


Client Tracking System details

- Intake: Know your community
- Enroll: Demographics and cohort
- Manage: Logic Model activities
- Assess: Measure outcomes
- Report: Up and down the organization

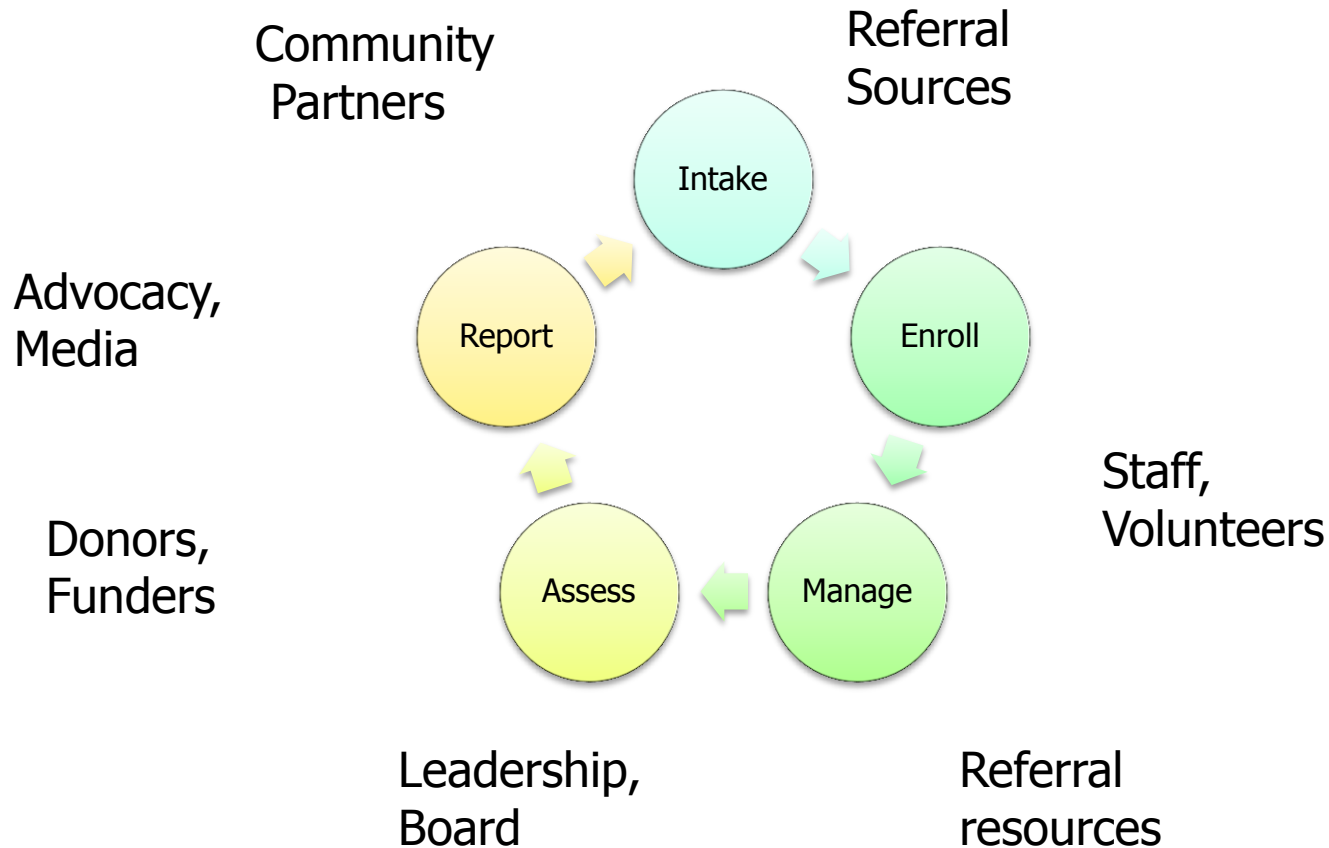


Think in Cycles





Think Holistically





What do I have?

What do I need?

- Basic List Management (Excel, Google)
- Custom database (Access, Filemaker)
- Customizable off the shelf (Salesforce, CiviCRM)
- General Human Services (ETO)
- Specialized Human Services (KidTrax)



Look for the Secret Spreadsheets

| Positives | Negatives |
|------------------------|-----------------------------|
| Easy, Quick | Flattens the data |
| Low Tech | Hinders comparisons in time |
| Self Managed | Hinders holistic view |
| Adapt to change easily | Lots of hand counting |
| | |



Current System Assessment Tool

- Pair up with a colleague
- Take the Assessment for your agency
- 10 mins.
- Questions?



Steps to a New System

- Assess Needs
- Select Software
- Discovery and Planning
- Implement
- Data Migration and Improvement
- Reporting and Analytics
- Train and Go Live
- Support and Administer



Software Selection Tool

- Review Worksheet



Ready for New System?

- Imagine project leader
- Imagine planning team
- Imagine executive sponsorship
- Imagine board, development funding
- Imagine fitting to annual calendar
- Imagine a data manager
- Imagine when to go live



Your Next Steps to Advocate for Outcomes Management

- Identify champions
- Draft a change statement
- Identify costs and benefits
- Develop a strategy to win key people to your vision
- Invest in outside assistance, long term
- Keep your measurement plan simple



Are You Ready for PM?

- Get ready: Read, learn, assess, plan
- Build your system:
 - Identify funded peer cohort of organizations (Capacity Institute, Bridgespan)
 - Build agency system solo (David Hunter, FSG Social Impact Consultants, Wellspring Consulting)
- Performance contracts (Pay for Success bonds)



Free books and reports

- Leap of Reason, Mario Morino
- <http://www.vpppartners.org/leapofreason/getit>
- Working Hard and Working Well, David E. K. Hunter
- <http://www.vpppartners.org/leapofreason/get-working-hard-and-working-well>
- <http://idealware.org/reports/understanding-software-program-evaluation?key=10035930>