

HRC Webcast
“From Outputs to Outcomes:
How to Use Program Data to Impact Client Outcomes”

Kristen:

“My name is Kristen Paquette and I am the Project Director of the Homelessness Resource Center. On behalf of the HRC, I would like thank all of you for joining us.

Today’s webcast will present a model for involving staff at all levels to systematically track program output, use these data to impact client outcomes, and favorably position your agency to obtain funding. This innovative model was developed by St. Vincent de Paul Village in San Diego, California. The Homelessness Resource Center is funded through the Center for Mental Health Services of the Substance Abuse and Mental Health Services Administration within the U.S. Department of Health and Human Services. The HRC seeks to improve the daily lives of people affected by homelessness and who have mental health and substance use problems and trauma histories. We seek to achieve this mission by increasing awareness, knowledge of resources, and capacity to help people experiencing homelessness. Our work includes training, technical assistance, publications, online learning opportunities, and networking.

Before we get started, I would like to take a moment to show you our interactive HRC website at <http://www.homeless.samhsa.gov> so that’s h-o-m-e-l-e-s-s-.s-a-m-h-s-a-.g-o-v. As you can see you will find frequently refreshed content on our homepage. This content includes tips, best practices, program profiles, and personal perspectives. These features lead you to additional resources to help you do your work everyday. You can also search our digital library to find helpful resources including manuals, research articles, reports, and tips. Currently, our library houses over 8,000 resources related to homeless services. An important goal of the HRC is to connect providers, researchers, consumers, and policy makers. As a registered HRC member, you can create a personal profile that will allow you to connect with other users, participate in forum discussions, and rate HRC resources. You can register to become an HRC member at any time by visiting our homepage and clicking on ‘register’ at the top of the screen. On our website you can also find information about upcoming conferences, trainings, and webcasts hosted by HRC and our partners. Materials from today’s webcast will be available on our HRC Webcast Resources Topic page accessible through the topics tab as shown here.

I would also like to share with you another helpful SAMHSA resource, SAMHSA’s Health Information Network, or SHIN. By joining the SAMHSA E-network you will receive up to the minute information about grant opportunities, new resources and SAMHSA campaigns and initiatives. You can also order free reports, brochures, and training resources by visiting the SHIN website at <http://www.samhsa.gov/shin>. SHIN also maintains a mental health and substance abuse treatment locator. Make sure your program is included by calling 1-877- SAMHSA-7 or e-mailing shin@samhsa.hhs.gov.

At this time I’d like to make a couple of logistical announcements. All attendees will remain on mute for the duration of the webcast. The presenters will take questions at the

end of their presentation today. To submit a question, write it into the Q & A box to the right of your WebEx screen. We will try our best to address as many questions as we can during today's presentation.

Now I would like to introduce our presenters. Kathy Bradshaw is the Program Analyst at Father Joe's Villages, a position she has held for more than four years. She earned her MSW summa cum laude from New Mexico State University in Family(?) Preservation. For more than 25 years Ms. Bradshaw has worked in social services including domestic violence, adjudicated juveniles, people living in poverty, family preservation and child protective services. For the last 10 years she has worked in homeless services. Julie DeDe is the Director of Social Services at St. Vincent de Paul Village, a position she has held for more than six years. She earned her MSW from the University of Washington. Ms. DeDe has worked in homeless services for 11 years. She began at St. Vincent de Paul Village in the assessment center before being promoted to Director. She now oversees an assertive community treatment team, case management programs, and short and long term transitional housing, the career and education center and the Village's mental health and substance abuse treatment program. At this time, I'm going to turn it over to Julie and Kathy and they will start their presentation.

Give us just a moment, we're just turning the screen over to Julie and Kathy as well. Julie and Kathy, you should be able to access your slides."

Kathy:

"Good morning, welcome. Do you find yourself making program changes in order to meet demands of a 'new grant'? Does everyone in your program know the 'definition of success' for each of your program areas? Are you tired of crunching numbers at the last minute program success report?

If you are familiar with any of these questions, then you are in the very right place. My name is Kathy Bradshaw and today we're going to be talking about Father Joe's Villages journey from outputs to outcomes. As with all journeys we've had some good times and we've had some rough times but if we had a choice to do it all over again, we would definitely do it again. Working with me today is going to be..."

Julie:

"Julie DeDe and I'm going to talk to you a little bit about Father Joe's Villages and the structure of our agency just to give you a context for how we... our agency and then how the outcome journey fits into that. So Father Joe's Villages with president Father Joe at the helm has several entities and you can see the little org chart you have up on the screen here. We have St. Vincent de Paul Village which is located in San Diego, Toussaint Youth Villages which has programs in San Diego and Campo, California, and also Martha's Village & Kitchen in Indio, California. We provide services to homeless people and also to people living in poverty. Whether the program is in San Diego or in other parts of California, Father Joes Villages offer an array of services, from a daily lunchtime meal that's open to anyone whether they live on the street or are housed to permanent affordable housing. In San Diego, our transitional housing program sleeps

more than 800 men, women, and children each night. In addition to our short and long term transitional housing programs, we have a continuum of services like case management, substance abuse treatment, mental health services, career and education services, a therapeutic child development center, a medical clinic, and many more services. We also provide permanent housing at five sites in the San Diego area. We actually have one building that just finished leasing up yesterday and a new building that's just getting ready to have the new people move in very soon, so we're really excited about that.

Two years ago we were funded by SAMHSA under their Services and Supportive Housing Grant to start an assertive community treatment team in two of our permanent housing buildings and that's sort of how we get here, to this webcast today.

So enough about Father Joe's Villages, let's talk about our outcomes. In 2002, Father Joe's Villages started our journey from outputs to outcomes. What prompted us to get started? Agency leadership recognized early on that funding agencies were moving towards describing how services impacted clients' outcomes, rather than just counting the number of things that we provided, outputs or you might hear people talking about counting 'widgets'. In order to stay ahead of this trend, we started on our journey. In addition, the management team wanted to move beyond 'crisis management' when writing grants and reporting to funders. Managers and others in leadership were tired of scrambling around at what always seemed like the last minute, trying to find data to justify programming.

So how did we prepare for our journey? First, we had leadership buy-in, the Vice President of programs who is in the, works over the umbrella of Father Joe's Villages, initiated the drive and went to the Division Director who oversees St. Vincent de Paul Village and immediately got her support. At that point, because it was top down, it came from the VP and went to the Division Director, we did have to do some work throughout the process to make sure that everybody else came on board, the management team, the managers, supervisors and down to the line staff. We'll talk more about how we got that buy-in later in the presentation.

We knew that we wanted to bring outcome measurement to the agency but we weren't exactly sure how to make it happen, so we hired a consultant to help our close to 15 programs at the time with the start up. Well we made some progress with the consultant, especially in developing mission statements. If we had to do it again, we would most likely start smaller and work through things internally, rather than bringing in a consultant. The consultant helped us to develop and strengthen and revisit our mission statement. We first revisited and strengthened the overall agency statement and then developed mission statements for each of the programs that are under the umbrella of St. Vincent de Paul Village. Why did we do that? A strong mission statement is vital to ensure focus in a final logic model. Each outcome must fit within the mission statement of the program and within the mission of the agency. Work on mission statements should be done first so that outcome development can be mission driven.

Before you begin, you must design or embrace a format for your logic model and Kathy's going to talk more about why we chose our format in the next slide. There are many formats that you can choose from, you must choose one that most represents your program and once you choose a format, you have to test it out because you don't want to change formats mid-stream, you don't want to have your work, or your group do all of this work in one format and then halfway through say 'Oop, we decided we want to use a different way' and then they have to do double work. That doesn't go very far in getting buy-ins.

You now have your mission statements and a logic model format, now what? Our suggestion is that you start with the program that has the greatest potential for the successful development of a logic model or for outcomes. This program should be reasonably successful at its goals already because it will quell some of the defensiveness that is inherent when change is presented. The leader of the program that you choose to start with should be somewhat data savvy. It ensures that you can retrieve the information that you need and also that that person understands putting the data into the system and why that is linked to getting the data out of the system.

Lastly, before you get started, you will need to decide when to measure success. Do you want to look at clients as they exit your program or do you want to look at them while they're still being served? You want to ask yourself, why do we exist? Those answers become your outcomes. Then you ask yourself, how do we know about these things? Those answers become your indicators. And lastly, you have to ensure that any data that you choose to track, that it can be tracked and then it can be retrieved. The Logic Model is the best place to record your goals and how you plan to achieve them. So let's take a brief look at the format we use at Father Joe's Villages."

Kathy:

"It's Kathy back for a couple minutes and I just put up on your screen, an example of one of the logic models that we use here at St. Vincent. This one is for our ACT program which is the program that's funded by SAMHSA and you can notice several of the key elements of this document.

At the top obviously you put the name of the program so everyone is immediately acclimated to which program you're working on. Followed by the mission statement as Julie said earlier, focusing all the outcomes to respond to your mission statement is really important. On the left column, column number one, is our need statement, why do we need this program? What's the point?

And then as you go across you can see what are the activities, those are your outputs, the activities and the people who participate in the program. And then you start getting into more of your meat, the outcome indicators, what's the change of status for the clients that are participating in the program. As you get a little bit further, there's some more detail that can be really helpful for anybody looking at this program's snapshot a little bit later in your process. Why is your percentage of success whatever it is? Well we have

these influencing factors that we don't really have a lot of control over. So that would be a good thing that we would choose to use in our logic model.

Then there's our data, that whole section on data there at the end, the source of the data, the instrument that we use to record and maintain the data, and the procedure that we go through in order to make sure that that data is useful for us when we start looking at it.

Down at the bottom, you can notice two separate things that are down there. One is the citation for the information that's in the need statement. We use need statement's that we research so we find out what are people saying, what is the research showing about our population that demonstrates that not only is our service needed, but that it is a best practice, that it's needed by this specific population. And then finally down at the very bottom on page one, we have the inputs and resources that are needed in order to accomplish the goals of the logic model. Now subsequent pages won't have the mission statement or the inputs and resources in our format, but this gives you an idea of what the totality of a logic model looks like. And again, this is based on a combination of the logic model that was developed by Kellogg Foundation, a separate one that was developed by the United Way, and a third one that was developed by the Urban League. So ours is a combination of three different logic models and we encourage you to use one that is going to be really effective for you.

We learned that this output to outcome process is an evolution. It takes time, you have to be patient and you have to be willing to go through all the steps. The first thing that we thought was important to do was just normalize it. Prior to our stepping off in this direction, most of the things that we reported to funding sources or to interested community members were definitely outputs, how many people sat in chairs, how many people were which ethnicity, you know really basic sort of factual, demographic or numbers based information that didn't really have a lot to do with the amount of the change, just like the rest of social services were doing in that era. So, for people to make this shift over to 'We don't care that there were 300 people in your classroom, how many of them improved their educational functioning level as a result of sitting in your classroom? That's what we care about'. That was big for people to see that change happen and to know that it was normal and common in the community.

Our earliest focus as we began making this change was on the process of outcome measurement. In the next section, next stage that we worked on we started talking about meeting our targets. In the next intermediate stage we started to analyze programs and in our final stage, where we are now and where we continue to be, is when we began to look at program changes as a result of the analysis.

We learned that, I guess we probably already knew, that people evolve at different rates and we needed to be patient with that. We want to push the evolution we don't want to be five years into it and not seeing any progress, but we also don't want to push people so hard and so fast that they lose heart and stop seeing the relevance or importance of this process.

The second thing that we did is we tried to help people recognize that when we're talking about outcomes, we're talking about those numbers that really back up what we think, what we feel, you know we can tell all these stories about these clients that we know, and I'm sure everyone that's listening has stories about clients that you know that have done amazing things as a result of the support that you've provided through your programming. But that's anecdotal information, we want it to be evidence-based so we need to be able to quantify it.

The other thing that we thought was very important in our process was to make it public and make it okay to report bad outcomes. So if you thought you were going to have an 80% success and you only had a 40% success, it's not 'shame on you', it's 'let's talk about what made that different than what you expected' and do we need to do something about it or are we okay with the 40%.

Some of the challenges that we had in our implementation was to get the program management buy-ins. As Julie said earlier, it was a top down process and so some of the program managers didn't really understand why we were doing it and we needed to get their buy-ins in order to be successful. Another challenge was that we weren't clear in the beginning stages about what the long term process was going to be and so when we talked to people about it, I don't think we were really successful in helping them know that we weren't going to just write up logic models and set them on shelves to gather dust, that wasn't the goal. We were going to continue using them as a way to evaluate our programs and successes and continue to improve on them. We also thought that it was going to take a lot less time than what it did. We're pretty good at managing crisis at this agency as I'm sure a lot of you are as well and so we just figured, boom, we've made a decision, we're just going to start measuring outcomes, alrighty then give us a couple of weeks and we'll have this down pat. That was crazy, it didn't happen in a couple of weeks, in fact it didn't happen in a couple months, it's taken a few years to actually get where we are today. We've been improving steadily, we've been able to measure and demonstrate our improvement as we've gone but where we are today, I think it took us five years or so to really get fully to the point where we were getting everything out of our outcomes that we wanted to get, or out of our outcome measurement process. And the final challenge was that transition for anecdotal success to measured success. Both are important, obviously, we want to know those stories about the clients and we want to be able to talk about them, individuals without identifying information of course, but that measured success is what's easier to report to.

Finally in the implementation, I wanted to talk a little about the successes that we experienced. Number one was upper management buy-in, so vital, you really need upper management to understand that staff is going to have to take a little bit of time out of that day to day program management to focus on the outcome process and in order to do that, they need to be bought into the process. Another success is that we've kept our outcome measurement process very fresh, we've kept it in front of staff, we've made sure that everyone on every level is aware of what's going on, we've listened to input from all parts of the agency and we really just kept developing and freshening it as we went on. There's been a great marriage between our Grants Team and our Programs Team which

has helped stop our crisis management mode of reporting outcomes or even grant writing. Instead of saying, 'Oh there's money let's go get it', now we say, 'Oh there's money, let's look at our mission statement, let's look at our outcomes, oh yes it does fit our programs, let's go get it'. So I'm sure some of you are familiar with that experience as well. It's also become a very cooperative evaluation process, so each manager does their presentation and everyone is there to support each other in doing it. (talks about how she is calling Julie carter by mistake) Finally the great success of it is that it has given us the ability to make evidence-based programming changes, which is vital as you all know, to growing your program."

Julie:

"This is Julie and I'm going to talk to you more about our process and how it works in our agency. So you'll see on this graphic depiction here that the logic model is front and center and is central to our process. The logic model, again just to reiterate, is our outcomes and the indicators that we use to measure those outcomes. So if we start at the top in the pink and/or reddish circle, programs record their data according to the procedures that we outline in the logic model in CSTAR and CSTAR is our agency's client management information system. Each program then has an easy to read report that extrapolates the data from CSTAR about each of the programs outcomes.

So that we're moving around clockwise to the yellow circle. Managers should look at their data on a regular basis but they are required to run the reports and determine if they are meeting their outcome targets and complete data analysis each quarter. And we'll talk more about what that looks like. We use two tools to support managers in analyzing their data. The first one is something we call an outcomes summary sheet and I'm going to pull it up. So the outcome summary sheet is essentially just an excel spreadsheet where the manager details their outcomes and their indicators and then when they run their reports, they evaluate whether they have met the target, whether they missed the target, or whether they exceeded the target. Within this particular tool, they're not reporting actual numbers, they're just reporting whether they missed, met, or exceeded and their talking about giving an explanation of that and if they missed the target than they're talking about an action plan. This document gets turned into, its available for the grants team, so that they can take a look and see how we're doing. It's also available for our leadership team which is made up of all the vice presidents of the agency and Father Joe and then any upper management has the ability to see this to just kind of keep track of how things are going.

In addition to this we have managers do a quarterly presentation at what we call our MOM meeting. So the quarterly presentation is a power point presentation, and I'm bringing up an example of this, a power point presentation where they present the actual numbers of their progress for their progress. So they've put on the left hand side, the target for the outcome, what they're trying to achieve, and then on the right hand side they're reporting their actual progress. They also then will present it graphically and the most important part of this presentation is at the end, after we sort of give the actual numbers, what is your progress, what do the numbers look like, then we move into the data analysis where the managers talking about here's where we exceeded our targets and

why we think that we've done that and how we can do more of that, how we can apply what we've learned in exceeding our outcomes into the places where we're missing things and into the places where we're just meeting our targets, and so that gives us an opportunity to really do that critical data analysis.

I'm going to switch back to our main presentation now. So these program presentations that are done quarterly are presented at something that we call the MOM. You know how we like to use acronyms in social services and there's nothing much more warm and fuzzy than the acronym of MOM to sort of embody the outcome measurement process. So MOM stands for Monthly Outcomes Meetings. Every month we have a meeting that is attended by all of the managers that are in the management team. Kathy attends that meeting, our Vice President of Programs attends and there's usually also our contract compliance person that comes and then quarterly the managers do the presentation that I just showed you about their particular program and reporting on their outcomes. So I'm going to talk to you a little bit more about the MOM.

So the MOM is an opportunity for the rest of the team to provide support to the manager who's presenting and encouragement around the outcomes and then as Kathy alluded to before, also to brainstorm. So somebody's up there, they're making a presentation and they present a question around we don't have as many clients coming in to access this service as we thought we were going to have and therefore that's impacting our overall target. And then the rest of the group can do some brainstorming around why they think that may be happening, what's changed in programming, what are they seeing in their programs that might be similar or different so that we can all work as a team to help that manager get to a place where they can meet or exceed their targets. Within any good management team, there's always a little bit of a friendly competition and so we find that this meeting is also an opportunity for people to show off their power point skills certainly, but also to give the opportunity for, the manager's up there, they're kind of putting themselves on the line and so they want to do their best so it helps them to really be prepared and focused on the data analysis piece of this. It also allows us to have a comparison of data across programs, so every quarter we're looking at, in a big group, we're looking at the data for all the programs. And I want to point out also that we have a logic model for our support service programs as well, so for our facilities program, our security team and food services where you'd think what could we possibly measure in terms of outcomes for those kinds of programs, we have logic models for those programs as well, and they also do presentations and we talk about how to help improve those supportive services that aren't necessarily directly interacting with clients but they really are such an important part of how we are successful as a village. So the quarterly presentations also help us to normalize the process. Again, everybody is up there doing it, everybody's talking about it, we're sharing our successes, we're sharing places where we're having challenges and so it becomes a really pure support environment versus something where you're sort of operating out of fear like 'oh no I'm not meeting my targets, what's going to happen to me now'. And it really helps those who are struggling to get input from other people so that they can make some progress.

So what else has to happen to keep this process going? We would recommend that an agency when you create this kind of process, that you have sort of the 101 manual that gives any new staff, especially managers but even supervisors and even some helping line staff, to really understand what outcomes are and orientation to your outcomes process. So it defines what's the difference between an activity and an indicator, you know how do I know what an output is versus an outcome. It defines the terms that you use and includes a standard copy or a blank copy of your logic model format, the format that you chose to use in your agency and then also details information on how your agency goes about recording the data that you're going to be measuring, how you retrieve it, so how you get it back out of your data management system, your expectation around monitoring that data, so do you expect your team to be looking at it every single day, is it a weekly process, should they be looking at it monthly, with quarterly presentations, what is the expectation around that monitoring. I'm sure you all know, if you're not looking at it regularly then all of the sudden a reports due and you say 'oh my gosh, I thought I was paying attention to this but now I have all this data clean up to do'. So what's your regular monitoring process and then how you go about correcting any data that might be entered incorrectly.

The other important thing about making sure that this process is sustainable is to make sure that it's doable. So we recommend that each program that you're measuring outcomes for has no more than three to five outcomes. Each outcome can have multiple indicators which gives you additional data about a lot of different items, but you keep it to a manageable size by having three to five outcomes per program. And then as we talked about before that you have standardized method for data presentation. So here I'm not only talking about that power point presentation that I showed you before, but I'm also talking about that everybody uses the same data base to enter the data and that you also have sort of a standardized way of retrieving that data via some kind of reporting. So if one program is going to use Excel or that's the way that the agency does it, then everybody should be using Excel, someone shouldn't be using hash marks on a piece of paper and another person is doing it in Word and someone else has an Axes database, that you're all sort of recording it in the same way and presenting it in the same way.

In our evolution, we had the MOM meetings for quite a long time but we only adopted a standardized power point in the last six months actually. So prior to that each program manager came up and they gave a presentation, we had a rough outline, but everyone kind of did it differently and what we found was it was a little bit harder to compare data across programs and to really ensure that we shared what needed to be shared and so we gave everybody a template for more of a standardized presentation in terms of that quarterly presentation. So when you put all of these things into place, what's the impact? Kathy's going to talk about that.

Kathy:

“Just before I start talking about the impact, I just wanted to put one more reminder out there, if you guys have questions, we're very happy to answer as many of them as we can when the presentation finishes. You just need to type your questions into the Q&A box and then we'll be able to field as many of them at the end as we can.

So regarding the impact, how has this changed our agency? What's been the outcome for St. Vincent de Paul Village? One thing is that we have increased our technological knowledge across the board. Every level of staff is more technologically knowledgeable than what they were before we started. That wasn't intentional, that just sort of happened in order to facilitate this process, people learned things that they needed to know in order to be successful. We find that our program managers are now actually managing programs rather than individual clients. Not that they're not aware and knowledgeable about what's going on with individual clients, but that they're able to take a back step and really look at the bigger picture of what's working effectively and efficiently and cost effectively in their programs and what's not, and what do we need to do more of, for those of you who may know Felucia Volka's work, what do we need to do more of because it's working and what do we need to cut out because it's not working so well.

We have identified needed program changes through this process, we've learned about things that were not working as well as we maybe thought they were before we started critically evaluating it using data and we've made those changes in order to support it. We also unexpectedly found that it built morale for program staff. So line staff, some of the newer people that work in our agency, are looking at what their contribution to the overall picture is and feeling excited and proud about that, as they have every right to do. They're seeing, though they may be in this moment dealing with one of the most challenging individuals that they deal with on their daily basis, they know that they are also contributing to this bigger success. And that while this particular client that they're having a hard time with right now may not be succeeding, there are a lot of others who are because they are able to look at the bigger picture of data. And that has created a much better morale among our program staff and that as you know is huge, but that's not all we've been able to see so far.

We also have increasing confidence in our annual board reports. We know that our data means something, we've been looking at it all year long, we've evaluated it critically and it's not something we threw together at the last minute and we hope it's pretty effective or hope it's pretty accurate, it's information that we are very confident about. It's established a common language across the agency for talking about program success including our board, our development team, our management team, our front line staff. So it's a great way that we're able to quickly and effectively talk about our successes. It's provided a lot of resources for grant writing. Managers are doing some of the research into what is the best practice, what is sort of the standard success in this particular area, what are great needs statements, how do we know that our programs are valuable to our community. So that, the grants teams will sometimes just pull things right out of the needs statements and insert them into an application. And it has increased our funding opportunities rather than decreasing them. It's really increased them because we are now more focused, we know exactly what we're trying to accomplish and we're going for the kind of funding opportunities that will help us to meet our goals rather than sort of distract us from our primary goals. Again, we're really happy that we started this journey. It's had an overwhelmingly positive impact on all of our programs and our agency in general."

Julie:

“Okay well, we’ve come towards the end of our presentation and I’m going to give a summary, I’m not able to get to that last slide at the moment, but this is Julie talking. So we started with a couple of small goals. We wanted to meet the trend of funders and we wanted to avoid crisis management whenever possible and that’s why we got started on this journey from outputs to outcomes. Then we spent several months preparing to implement this agency wide process and to make sure that everybody was confident in all of the tools and the things that we talked about, so logic model, data storage and retrieval. Then we created and refined logic models for each of our programs and we’ve steadily ensured that this process continues and grows throughout the agency. So we keep it alive in several ways, not only by those quarterly presentations but also every year, all of the data from the logic models gets grouped together into an entire logic model for all of St. Vincent de Paul Village and we put that into a power point presentation that our Division Director actually takes to our Board of Directors and then she goes around to each of the programs and presents the whole picture of what the agency, in total, is doing to be successful. So that’s one way we get that buy-in from the line staff.

And as Kathy was just saying, the impact that we’ve been able to see has improved our services, it’s improved the impact that we’ve had on clients because we’ve been able to make changes to programs when things weren’t working as well as we thought. It was a tough journey, it’s been a lot of work, we’ve had a lot of refining that we’ve done over the years but we definitely recommend it. I also want to say before we end the formal presentation part, that we are a big agency, we have I think I just heard a number of 556 employees in Father Joe’s villages, but this process can be done at large agencies and at small agencies, whether you have just one manager and a couple of line staff running your program or if you have a whole org chart of various different levels of management hierarchy, we believe this process can be implemented at agencies large and small. And that, is the end of our formal presentation. I’m not sure why we can’t get into the next slide, but Kristen we’re ready for the question and answer time.
(Long Pause) Jonathan or Kristen? Are you there?”

Q & A

Kristen:

“Hi there Julie and Kathy? Hi sorry we’re having a little trouble on our end with the phone. Thank you so much that was a wonderful presentation. I have quite a few questions from the audience. The first one that I have is; Have there been data quality issues across the 15 sites? And as a secondary part to that question, how much time did you allow to help other sites ramp up if their data was not up to standard for this process?”

Kathy/Julie:

“The answer to that question would be yes and in fact, the problem with data is that humans enter it and so you’re always going to have a certain amount of human error built into your data and the way to be successful at minimizing that or eliminating as much of

it as possible is to have monitoring abilities with your data, so that you can back and review it for accuracy. And have it updated when you find errors.

Right, this is Julie. What I was going to say was that if your monitoring process is one that happens regularly then you identify data entry issues early and it doesn't become so overwhelming or it doesn't become such a big crisis at the end and it allows staff to make changes the way that doesn't feel as bad to them because they catch it early and then the problem isn't as big. So in terms of the second part of the question, how much time did we allow, it depends on the program, it's Kathy again, it depends on the degree of problem, so somebody who was maybe just doing this one little thing off, it's like 'Ok guys here's how were going to fix this and go' and it's done. For somebody who had staff that were maybe a little bit less data savvy when they started, maybe making greater errors, more patience is needed. So it's kind of hard to talk about a specific amount of time for any program. It's important to be reasonable but also to have high expectations."

Kristen:

"Okay great, another question I've got is; what are some examples of programming changes that have come about as a result of this process?"

Kathy/Julie:

"Let me see if I can think of a good example off the top of my head. I certainly should have written some of these down because it's not coming to... Can we come back to the question?"

Kristen:

"Sure, didn't mean to put you on the spot there."

Kathy:

"I don't mind being on the spot, I wish I had a better answer, faster."

Kristen:

"Sure, well I've gotten actually several questions asking you to talk a little bit more about some specific methods for program staff buy in and one question in particular comes from somebody who is interested in coordinating this process across three separate departmental divisions and is wondering how she could go about getting buy in, in that scenario as well."

Kathy/Julie:

"I have a similar situation. I am the program analyst for all of Father Joes Villages and so our Toussaint Academy Site which is Campo and San Diego and then also our Martha's Village and Kitchen site which is in Indio, are my responsibility as well as the St. Vincent de Paul Village site. I think that the tools that I've used to get the most amount of buy in from them is to make sure that I spend enough time with them in person. So I don't feel that it's effective for me to sit in my office in San Diego and expect our Indio team to come on board. They need a touchstone. In social services we

like people, that's why we're in this field and so if I just send out papers and data and numbers and outcomes and ask for their buy in, right away I'm starting from a foundation that they're not familiar with.

So step one for me was to build great relationships with those folks that I wanted to bring on board, regardless of the location. Step two was to maintain that relationship while introducing these concepts and helping them become familiar with them and then helping them to start taking the steps down the outcome measurement path.

I think, this is Julie, the other thing about it is just that normalizing process and helping people understand that this isn't about... I think people come at it from a place of fear because they feel like if their not accomplishing their goals that they're going to get in trouble or that there's going to be some sort of reprimand in place. So being really careful about making sure that that's not happening, that it's a supportive process and that takes some time for people to build that trust and you just have to sort of keep at it for those people who continue to not believe you that you're not going to knock down giving them a raise because they didn't necessarily meet their outcome."

Kathy/Julie:

"Okay I have an answer to what examples of the programming changes. There are two different things that I want to mention. In our Career and Education Center program, one of our outcomes is that we will help clients who do not have a GED, that we'll help them to obtain that, meet that goal, and what we learned through really looking at the data and measuring outcomes is that our line staff didn't understand adequately that that was one of the goals of the program. We give them the procedures to read and we train them, we've had some staff that work in that program that have been there a really long time and they had sort of lost focus on that goal and so we were seeing that nobody was getting help toward that goal and so the change was an easy one, but basically it was just to reemphasize the fact that that's a part of our program, that it's important and that we really need clients, to be helping them along towards not only increasing their education scores which we were doing a great job at, but also taking that next step and getting their GED.

The other thing that I'll mention is that we're able to look at data separately for our success rates for our long term single men versus our families versus our women and we've been able to really see and start to really talk about why is there a difference in success for men versus women. And we haven't necessarily landed on a change yet, the exact changes that we're going to make, but what we do know is that we're more successful in some areas of the program with men than we are with women. So we want to be looking at, we're looking at now, are there changes that we need to be making, what do we need to be doing differently to make sure that we have the same success, that we're equally successful with women as we are with men."

Kristen:

“Ok great, so another question, could you talk a little bit about how you can report positively on some outcomes that may not appear to be so positive and how you could present those favorably in terms of trying to obtain more funding?”

Kathy/Julie:

“Is there an example?”

Kristen:

“No there is not.”

Kathy/Julie:

“I think that if you remember from the logic model format, column six on influences. If you have a particular goal that you are working towards with your clients that is heavily influenced by community, for example one of the things in San Diego is that they used to have a mandatory ticketing law. So if you were sleeping on the street at all, they could give you a ticket. So a lot of people didn't want to get those tickets, didn't want to be roused my law enforcement so they would come into the shelter. When they stopped ticketing, then it became less problematic for some folks to stay on the street and so they were less interested in coming into the shelter. So if we're trying to measure the number of people that are coming off the street and into the shelter, that's something we have no control over that's happening in our community that we would be able to explain to a funding source why our numbers may not be what we had expected them to be for that particular situation. So that would be one thing, if there's some influencing factor whether it's external, whether it's a trend among the population, whatever it might be, if it's a funding issue, that you're not able to put as much staff towards a goal as what you need to because you don't have enough money to do it but you see in the areas that you do have enough staff that it's working. That would be another way that you could help explain to a funding source and put a more positive twist on it.

Also if it's a short term trend, let's say you've been meeting that goal for a long time and all the sudden there was a bump, you aren't meeting the goal suddenly, you can look at what happened, like what created that situation and you can be honest with the funding source. And what are you going to do about it, so moving forward this is what we're changing in our programming so that this doesn't happen again. Those are some ideas I can think of, Julie, do you have any other?
No, I think that covered it.”

Kristen:

“Could you talk a little bit about how you arrived at three to five outcomes per program and how you understand this to indicate client progress? Is it enough outcomes for every program to be able to indicate client progress with three to five outcomes?”

Kathy/Julie:

“Yes and three to five is sort of the rule of thumb. It's not written in blood, so if you need to alter from that, you know I'm not saying 'Don't you ever change from that', but

if you think about when you work with an individual client, what's an appropriate number of goals, what can they manage, what can they wrap their arms around. Much more than five and it's pretty overwhelming and it's hard to stay focused and it's easy to get confused and get off track and you know for folks who are easily distracted, that doesn't help you achieve your goals.

So when you're looking at a program, we sort of took that same approach. We have people working in programs and if they have three to five major goals that they're working towards, that's probably enough to stay focused on. And then the indicators is where you can get into a little more detail. So let's say our case management program for our transitional housing program, their three goals are; 1) permanent housing, 2) financial stability and 3) improved ability to maintain those, so like an improved quality of life and an ability to maintain that housing and the income. So under the housing goal, the indicator is pretty simple, it's just that when they leave here, they go to permanent housing but under the financial stability goal, the indicators are more. One would be that they have an increased income or another would be that they're income is more stable, so if they came in with TANAF (inaudible) they're leaving with employment or if they came in with nothing maybe leaving with social security, disability income or whatever the appropriate income is for them, but it's a more stable type of income, that it's a higher amount of income, that they have a savings account and it actually has some money in it. So there's indicators. The indicators allow you to get more in depth and to really measure more and varied things than the outcomes. So to say three to five outcomes can sort of... well anyway just know that the indicators can help you to broaden out the different kinds of things you can measure.

One of the ways that I sort of picture it for myself, I'm a social worker by training and experience and so rather than a data analyst and when I think about outcomes I think about goals and when I think about indicators I think about objectives. As goals are more broad scope and objectives are detailed, who's going to do what, by when, through what means. So if you look at it sort of like that, you know you still want numbers in your outcomes, you still want percentages in your outcomes, but if you look at it more on that level, maybe that helps a little bit."

Kristen:

"Ok thank you. Now you mentioned towards the end of your presentation, in your summary, that you can use this model for any sized program but I've had a couple of questions about whether you can apply it to programs of different types, for instance, a program that provides food assistance or holiday assistance or applying it to a different population, somebody is wondering if you can apply it to a population with mental retardation rather than homelessness."

Kathy/Julie:

"Excellent, excellent question. Here at St. Vincent de Paul Village we have 17 different programs. We have food services and we have a logic model for food services and they do MOM presentations. We have security, which is the folks that help keep our campus safe and we have a logic model for them and they do quarterly presentations. We have

case management and residential services, we have volunteer services is one of the programs which was very interesting because we had to define who are their clients. Their clients are not necessarily the homeless person who is living in the JKC, their clients really are the staff of the JKC who needs some support from a volunteer. The only program that we've had trouble defining outcomes for is our Chaplaincy Program and so one of the things that came to light as we were working through that was, well how do you measure God? So, we've kind of left that one alone and Chaplaincy is the one program that we have on campus that currently does not have a logic model and the only one. So basically the short answer to that is yes, you can really apply this, this particular logic model format as Kathy mentioned was developed, we kind of picked it from a variety of different agencies and different templates, but it can really be modified for any, you can put in outcomes for any kind of different program. I initially started working with the logic model concept when I was working for a child abuse prevention agency in Washington State and we used a logic model that's very similar to this for a whole variety of child abuse prevention programs.

Kristen there was a question that came up on the chat about whether or not we get funding from HUD and whether or not this logic model suffices for HUD logic model format and I wanted to answer that question if that's ok. The answer to that is we still have to use HUD's e-logic model format, we haven't been able, although we've tried, to convince them that this is a more robust format. We do still use the e-logic model format but what this has done is given us a really easy ability to just take the data from our logic model and sort of translate it into HUD's e-logic model."

Kristen:

"Okay, thank you, I've got a few more questions. You mentioned that you have to decide between measuring clients served versus exited. Can you tell us more about what you mean by that?"

Kathy/Julie:

"Depending on your program, so if you're doing a permanent housing program, an ACT sort of model, you're probably going to want to measure clients served. You're going to want to measure progress in the client who's still in the program over time because it's not really a goal for that client to graduate from the program or leave.

But with our transitional housing programs where it is a goal for them to leave the program successfully, we use an exited model for all of those clients. So we want to know they stayed in here for whatever period of time and at the time they left what impact did we have on them and basically we measure nine different areas of life functioning across several different logic models. So in the area of mental health recovery, substance abuse recovery, education, vocation, etcetera, etcetera. So for those folks we had this period of time to have an impact on them and now they have left our program and we're not working with them anymore. So how did we do? For our ACT clients, we hope to have a long term relationship with them, we're not trying to get them to move on, so we measure the client currently in the program and how they're doing as they go along. It's harder to ensure that you have unduplicated client data when you use

served data. It's easier to do that when you use exited data, so when you're done the client leaves and you measure everything at that point, then you know you're not reporting two or three times on that client's progress and mental health recovery, you're only doing it one time."

Kristen:

"Ok great. Another question, can you give some additional examples of outcomes that you use in your programs?"

Kathy/Julie:

"Sure. Well let's see, I'll talk about our career and education services, so one of our outcomes for that is how many clients leave with employment, then we have an outcome of improving tests, we use the Test of Adult Basic Education which is a standardized academic assessment, and we measure how many people, or the percentage of people who improve their scores on that test. Back to how many people get a job and how many maintain that job for six months or more, how many jobs are we getting people that are above the living wage, which is a moving target of course.

Then in our recovery services we measure length of time sober, we measure increased knowledge by pre and post tests regarding addiction processes and so forth. That's recovery services. In mental health services we have three areas that we measure which would be the improved psychological well being, a reduction in symptoms and meeting treatment goals, whether or not they met specific treatment goals. Those are some examples.

We're happy to, I'm a little hesitant to put it out there, but the slides can be distributed and on the last slide that we weren't able to bring up does have our contact information, so we're happy to answer individual questions."

Kristen:

"Great, how do you handle it when a program is not meeting its outcomes?"

Kathy/Julie:

"We chastise them soundly and publicly, no no no no. Wait a minute that's a different thing. That happens sometimes but usually we catch it very early because our process is so ongoing, so people have a great awareness of where they are as far as their outcomes are concerned and they reach out for help right away because the process has become so normalized within in the agency that the people know its not a matter of getting in trouble, its not a matter of 'shame on you, you're not meeting your outcomes'. What is really is, is 'ok, so what's different that we're not meeting this outcome today, what has changed', because for all of our outcomes that we have, at one time we've met them. So what has changed that this outcome isn't being met and what might we need to do differently in order to ensure that its met in the future. And that's how we deal with it.

Sometimes what we learn is nothing. The population has changed, the trends among the population have proven that this is no longer the right outcome or the right numbers, we

shouldn't expect to do it at this volume and so we need to make an adjustment to the outcome."

Kristen:

"What would you suggest in terms of programs looking for funding to do this kind of process?"

Kathy/Julie:

"What? I didn't understand the question Kristen."

Kristen:

"So where would you suggest that programs either look for funding or advocate for funding within their agency to implement this kind of process?"

Kathy/Julie:

"Oh you mean like money to actually pay for someone like Kathy or to pay for... Right that's an interesting question. I think within our agency we have just made it a priority to carve out some of every manager's time to make this happen and so we actually don't have a lot of specific funding to make it happen. So I'm not actually sure that we have a good answer for that.

It can go into some of the admin costs and some of the current grants that you have. It can be included in some of those admin costs because it truly is specifically geared toward helping you to report accurately to your funding sources. Other than that, as far as I know, I don't know of any money that's out there specifically to help you to develop an outcomes measurement program. It might exist, but I don't personally know about it."

Kristen:

"The next question is a staffing question. What role has information and technology staff played in this process for you?"

Kathy/Julie:

"That's a good question. A huge role. That's another one of my hats, I'm Kathy again, and that's another one of my hats as the program analyst is liaison to IT. Since they manage our database and help keep it organized, keep it functional and all that. Since we have a proprietary database, we own it, we manage it, we can make adjustments to it as we choose. Our IT department has been invaluable in this process, so in helping us to adapt our database to meet our needs, that's been huge. And in helping us to develop the reports, I'm not actually a report writer so I don't know how to pull the data out of the database, I can tell them what I need pulled out and how I need it pulled out, but they actually write the tool that does the pulling.

So they were another group that we brought on board really early in the process and I don't think they can be brought on too early."

Kristen:

“Have you used this process to support any accreditation efforts and some examples that this person gave in their question are URAC, NCQA, CARF, if you’re familiar with any of those accrediting agencies?”

Kathy/Julie:

“I think our medical clinic has some accreditation associated with it but neither Kathy nor I directly supervised that program so I don’t know the details. We do have state certification for our recovery program, our substance abuse treatment program although they don’t directly require you to have outcomes, it has definitely helped to tighten up our processes in terms of treatment planning and all that kind of stuff. I think that probably the short answer to that question is no.”

Kristen:

“Ok, one person is wondering is the MOM 101 manual that you mentioned, is that available to the public?”

Kathy/Julie:

“I don’t know how helpful it would be because it’s pretty specific to our exact process so I’m not sure how helpful it would be. If someone specifically wanted that I would rather visit with that person and see what it is they’re actually looking for, whether or not that manual would meet their need.”

Kristen:

“Ok well that’s actually it for the questions from the audience. Julie or Kathy do you have anything else you’d like to add at this point?”

Kathy/Julie:

“I mean again, we’re happy to answer questions via e-mail although it may take a little bit of time for us to get back to you. We’re in the middle of a couple of big grant writing things at this moment. The other thing is I do believe the slides are going to be made available. Is that correct Kristen?”

Kristen:

“Yes, you are able to access the slides at our website, <http://www.homeless.samhsa.gov>. When you go on our website you’ll see a topics tab and there’s a topic called HRC Webcast Resources, so if you just go there, those will be posted later today.

Kathy/Julie:

“And if we talked to fast and you weren’t able to take the notes that you wanted to take, again we’re happy to try to answer individual questions or clarify things for people.”

Kristen:

“And Julie or Kathy, would you mind just saying your e-mail address since we don’t have it up at the moment?”

Kathy/Julie:

“Sure it’s each of our e-mail are our first and last names, so it’s Kathi.Bradshaw@Neighbor.org and then mine is Julie.Dede@Neighbor.org .”

Kristen:

“Thank you, before we wrap up, I just wanted to let everyone know that the next webcast in our HRC free webcast series will be on Wednesday May 27th, this webcast is titled ‘The First Step is an Open Mind: Best Practices for working with lesbian, gay, bi-sexual, transgender and questioning youth’. The webcast will feature Richard Hookes Laymen of the National Alliance to End Homelessness and Carl Fesiliano of the Ali Forney Center. They will provide a background of the issues that LGBT youth who experience homelessness face and discuss the best practice recommendation recently released from the National Alliance. Please plan to join us at 12pm EST on May 27th. After today’s webcast, some of you should receive some brief evaluation questions about today’s presentation. Please take a moment to complete these questions, your feedback is very important to us and it helps us to serve you better through these kinds of training opportunities.

On behalf of the Homelessness Resource Center I would like to thank our presenters, Kathi Bradshaw and Julie Dede and all of you for taking time out of your day to be with us. Thank you and have a great day everybody.