

Pathways to Excellence Conference

Mission Results: Excellence in Tracking Outcomes Workshop

10:30 AM – 12 Noon
ROOM 802

Facilitator:

John LaRocca, Rensselaerville Institute

Panelists:

Dr. Neil Calman, Institute for Family Health, 2008 Winner for Excellent Use of Technology & Focus on Mission

Rachel Cytron, Harlem RBI, 2008 Winner for Excellent Communications

Tony Hannigan, Center for Urban Community Services, 2007 Winner for Excellence in Sustained Impact

How do you define success in achieving your mission? Need help identifying when you've achieved it or communicating the results? Learn how managing for results can focus your organization and stakeholders on what's important about your work and the difference it makes. Learn tips from high-performing nonprofits and a leading expert. **Exercise:** Three Keys to Outcomes Management **Take Home:** Tips for Tracking Milestones and Verifying Accomplishments

Agenda

10:30 AM -10:45 AM	Outcomes Management Tips from Winners of the New York Times Company Nonprofit Excellence Awards
10:45 AM -11:15 AM	Exercise Feedback Take Home
11:15 AM -12:00 PM	Q & A

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Organizational Profile
for
Center for Urban Community Services (CUCS)
2007 Prize Winner for Sustained Impact

The Center for Urban Community Services (CUCS) is a New York City-based housing development and comprehensive social services organization providing housing placement, mental health, employment, and a range of social services to individuals and families. CUCS has 265 full-time employees and serves 20,000 people per year throughout the city, in addition to providing training and consulting services to non-profit organizations nationally. CUCS' mission is to end homelessness for as many people as possible and provide opportunities for low-income individuals and families to achieve their goals. CUCS has an annual budget of \$26 million, and was originally founded as an interdisciplinary project in 1979 at Columbia University.

CUCS' tracking of mission-related results began in 1988 at our shelter for homeless women in lower Manhattan. Following five years of helping women to contend with homelessness— providing them counseling, food, clothing, health and mental health care – we set the goal of ending homelessness for every woman who entered the program. Today, CUCS' services for homeless people are centered on housing placement, and data is used to track and improve outcomes throughout the organization. Maintaining an environment of continuous quality improvement by tracking and assisting individual staff efforts, client stability and progress, and overall programmatic outcomes are core management values. CUCS' ability to track and report outcomes has made us more effective with our clients and in the larger housing and services arena. These successes include the development of the Manhattan Street Registry, expansion of services to chronically homeless individuals, and innovative strategies for implementing evidence-based practices.

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Organizational Profile
for
Harlem RBI
2008 Prize Winner for Excellence in Communications

Harlem RBI is a New York City-based provider of youth development services consisting of After-School Programs and a Charter School that employs 46 full-time and over 125 part-time people and serves over 800 youth per year in East Harlem. Harlem RBI's mission is to provide inner-city youth with opportunities to play, to learn and to grow. We use the power of teams to coach, teach, and inspire youth to recognize their potential and realize their dreams. Harlem RBI's annual budget is \$7.1 million. The organization is 17 years old.

Harlem RBI's tracking of mission-related results began in 2004 when the organization was completing its second strategic plan. At that time, the organization realized that it had tremendous success with its strategy of engaging youth over long periods of time. As part of the strategic plan, Harlem RBI concluded that it needed to be more thoughtful and definitive about the long-term outcomes it expected from its participants. At that time, Harlem RBI developed a "Dream List" detailing the long-term outcomes it was working towards and created plans for how it would track these outcomes. Today, Harlem RBI's outcomes tracking is notable for constant, ongoing evaluation of indicators that engages all levels of the organization from Board to line staff, including weekly reports to senior management on predetermined goals and outcomes, monthly manager "dashboard reports," to the Executive Director, annual 360° board performance review, and an annual executive director review. In 2008, Harlem RBI hired a Director of Organizational Excellence to lead organizational evaluation and act as ombudsman! Together, these strategies and tools focus the organization on results. Harlem RBI's ability to regularly track and report mission-related results has helped it to improve the way it communicates its mission, purpose, and success to stakeholders.

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Organizational Profile
of
The Institute for Family Health

2008 Prize Winner for Use of Technology and Focus on Mission

The Institute for Family Health is a New York City-based provider of health care services that employs 640 people and serves over 70,000 people per year throughout Manhattan, the Bronx and the Hudson Valley. The Institute's mission is to provide primary health care services, including dental and mental health services, to medically underserved populations, and to train the next generation of dedicated health professionals. The Institute does this with a budget of \$50 million annually, an amount that has grown from just a few thousand dollars a year when it was founded 25 years ago.

The Institute's tracking of mission-related results began with its first grants in 1983, given by the Federal government to train faculty for family medicine residency programs. These grants required tracking trainees as they entered their professional careers to report on whether they indeed went into teaching, and whether they were training doctors who went on to care for the medically underserved. Today, the results of all of the Institute's primary care services are tracked through its very sophisticated electronic health record (EHR) and practice management system, which permits the organization to examine the health outcomes of the patients it serves. The Institute has programmed this system to enable it to look at health outcomes for each of the 25 centers it operates and for each of the more than 100 primary care providers who work in them. Sophisticated systems also track financial performance and will soon track human resources functions as well.

Maintaining a high quality health care network like the Institute's could not be done without the EHR system. The Institute's network spans over 1100 square miles, and serves both inner-city and remote rural clients, including those who are homeless and those who perform seasonal migrant labor. The system provides data that tracks both the processes of care such as immunization rates and patients lost to follow-up, as well as the outcomes of care, such as the number of patients whose blood pressures, lipid levels and blood sugars are well controlled.

The Institute is a national pioneer in the use of digital patient records, which have now been configured to permit patients to view their medical records remotely and promote patient-provider communication between visits. The EHR system has also enabled the Institute to identify areas of weakness and target improvements at both the health center and provider level. This often involves identifying high-performing centers and providers and using them as models for quality improvement. These ongoing quality improvement efforts have provided data for grant requests to help the Institute offer better care to its patients and to document the improvements that have resulted.

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Building Outcome Management

In-Class Exercise

Do you know the difference between a benchmark, an indicator, a goal, an objective, an outcome, a result, an impact? So many words used differently in different frameworks. The consequence is that many nonprofits now see outcome frameworks as simply another form of procedural compliance. Tell us what to say and we'll say it.

How sad! If outcome management is to become the way you live to achieve—with energy and even joy—it has to be about more than fund-raising and reporting. It has to be about success for those you help.

Forget the funder. Our view is that a nonprofit group has an outcome management framework in place if it can answer for all its programs these three questions:

1. How do you define success—meaning results from your services?
The first question asks you to be clear about results—not just activity and process. This means you can tell investors and stockholders what result you are committed to achieve.
2. How do you know for sure when success has been achieved?
The second question asks for clarity on the evidence to be used to confirm success. You now know how to verify.
3. Half way through your program, how do you know that you have enough time and money left to get the success you have defined?
By answering the third question, you have a way of tracking progress not just against budget categories and work plans but against participant progress to the gain they are to achieve.

And yes, you can make a more compelling case to your funders!

Let's answer the questions.

Outcome management starts with thinking about the end...the result. A line from Alice in Wonderland is powerful advice: "If you don't know where you want to go, any road will get you there." And it is not about what you do...it is about the changes in the people or the situations that your activities are designed to reach.

1. How do you define success?



Some Guidance

These three steps followed in sequence, will help you devise performance targets for your program:

1. Identify the changes or conditions you seek
2. Specify the degree of change you consider a success
3. Estimate how many people you serve

Take a moment now to make some notes about the kind of behavior change or condition you seek and the degree required for you to consider it a success. (No numbers of people yet!)

Step 1. Kind of change or condition (the behavior or conditions you seek)	Step 2. Degree required for success (how much of it, for how long, minimum required)

Step 3. Numbers of people served who will change (list the behavior or condition change and degree)

2. How do you know for sure when success has been achieved?

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Take Home Exercise

Verification

Verifying is a simple way of determining that your definition of success has or has not been achieved. The point of this is to have evidence of result accomplishment. Without verification, there is no way of knowing whether the people you serve are actually benefiting from a service or intervention. You don't necessarily need "rocket science" to verify accomplishment.

3. Half way through your program, how do you know that you have enough time and money left to get the success you have defined?

Milestones – Predictors of Success

Milestones are interim behaviors that define progress for the people you serve. In any good outcome framework, groups are always looking to align activities with consequences. They want to make all their program behavior intentional to results. This can get very sophisticated if we chose to do so, but just list above some of the key points of behavior or condition that represent progress toward the change you have defined as success.

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Tips from Workshop Panelists: Three Steps to Improve Outcomes Management

★ Institute for Family Health

- 1.** Innovate—innovators draw attention and funding and enhance employee pride in their organization
- 2.** Automate—to gain maximum efficiency, monitor performance, provide management data
- 3.** Educate—to enable everyone to do their job in the most intelligent and capable manner possible

Source: Neil Calman, ncalman@institute2000.org, 212-633-0800

★ Center for Urban Community Services

- 1.** Identify areas where outcome/tracking data may be helpful to the organization/staff
- 2.** Invest in program evaluation via expertise in the form of dedicated consultants or staff and data collection systems
- 3.** Work toward creating an organizational culture vested in the use of outcome data

Source: Tony Hannigan, thannigan@cucs.org, 212-801-3300

★ Harlem RBI

Harlem RBI uses an outcomes Scorecard to report on organizational and program results. These will be distributed at the workshop.

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Resources

John LaRocca, Rensselaerville Institute (RI), <http://www.rinstitute.org/>

RI Books

Outcome Funding: A New Approach to Targeted Grantmaking

by Harold S. Williams, Arthur Y. Webb and William J. Phillips

Outcome Frameworks: An Overview for Practitioners

by Robert M. Penna and William J. Phillips

Target Setting & Result Verification Guidebook

by The Rensselaerville Institute

RI Articles

Innovating Reprint; V6, N1 Describing Work...The Job vs. the Result

Innovating Reprint; V1, N4 Learning vs. Evaluation

Innovating Reprint; V1, N2 Informing vs. Persuading

Innovating Reprint; V7, N3 Collaboration vs. The Three C's

(Cooperation, Coordination, and Communication)

Innovating Reprint; V4, N1 Strategic Planning...the Outcome Approach, Part I

Innovating Reprint; V4, N2 Strategic Planning...the Outcome Approach, Part II

Innovating Reprint; V6, N4 Missions, Visions, Beliefs - Rekindling the Flame

Forces for Good: The Six Practices of High-Impact Nonprofits, Leslie Crutchfield and Heather McLeod Grant

Good to Great and the Social Sectors: A Monograph to Accompany Good to Great, Jim Collins

"Measuring What Matters in Nonprofits," The McKinsey Quarterly May 2001, http://www.mckinseyquarterly.com/measuring_what_matters_in_nonprofits_1053

The Center for What Works, <http://www.whatworks.org/> and **WhatWorks Outcomes Portal**, <http://portal.whatworks.org/welcome.aspx>

Nonprofit Coordinating Committee of New York

Conference Evaluation

Workshop Title: Pathways to Excellence Workshop Date: November 6, 2008

1. Did you find the conference helpful? Y__ N__ Comments:
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2. Did it match your expectations? Y__ N__ Comments:

3. Please rate the following aspects of the conference: *(Please circle)*

<u>Poor</u>	<u>Fair</u>	<u>Neutral</u>	<u>Very Good</u>	<u>Excellent</u>
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A. Quality of speakers					
1) Naomi Levine	1	2	3	4	5
2) Reynold Levy	1	2	3	4	5
3) Outcomes workshop leaders	1	2	3	4	5
B. Materials/handouts	1	2	3	4	5
C. Content of Session:					
1) Naomi Levine	1	2	3	4	5
2) Reynold Levy	1	2	3	4	5
3) Outcomes workshop leaders	1	2	3	4	5

4. Did you learn anything useful/new today? Y__ N__
 If yes, please provide example(s):

5. Will you use the knowledge gained at today's workshop to improve your organization?
 Yes____ No____

6. If so, how?

Suggestions/changes/improvements:

7. Your Name/Your Organization:

In an effort to improve the content of our meetings and evaluate their long term usefulness, NPCC may ask you to complete an online survey about this conference 3 months from now. Please help us by responding to our request.