

IL NET

an ILRU/NCIL National Training and Technical Assistance Project

Expanding the Power of the Independent Living Movement

What Are We Doing & How Well Are We Doing It? Outcomes Measurement & Independent Living *A National Teleconference*

Participant's Manual

September 17, 2003

Contributors to the training materials:

Liz O'Hara
Kristy Langbehn
Richard Petty

Dustin Stamper
Anne-Marie Hughey
Dawn Heinsohn

© 2003 IL NET, an ILRU/NCIL Training and Technical Assistance Project

ILRU Program
2323 S. Shepherd Street
Suite 1000
Houston, Texas 77019
713-520-0232 (V)
713-520-5136 (TTY)
713-520-5785 (FAX)
ilru@ilru.org
<http://www.ilru.org>

NCIL
1916 Wilson Boulevard
Suite 209
Arlington, Virginia 22201
703-525-3406 (V)
703-525-4153 (TTY)
703-525-3409 (FAX)
1-877-525-3400 (V/TTY - toll free)
ncil@ncil.org
<http://www.ncil.org>

Permission is granted for duplication of any portion of this manual, providing that the following credit is given to the project: ***Developed as part of the IL NET: an ILRU/NCIL National Training and Technical Assistance Project.***

IL NET is funded through a special provisions cooperative agreement with the U.S. Department of Education, Rehabilitation Services Administration, Agreement No. H132A020004.

What Are We Doing & How Well Are We Doing It? Outcomes Measurement & Independent Living

A National Teleconference
September 17, 2003

Participant's Manual Table of Contents

Agenda.....	<i>i</i>
About the Trainers.....	<i>ii</i>
List of Trainers	<i>iii</i>
IL Net Staff	<i>iv</i>
About ILRU and NCIL.....	<i>v</i>
About IL Net	<i>vi</i>
Learning Objectives.....	1
Introduction to Outcomes Measurement	2
Program and Logic Models	3
Overcoming the Challenges	10
Resource List	12

What Are We Doing & How Well Are We Doing It? Outcomes Measurement & Independent Living

Agenda

September 17, 2003

All Times Eastern

1:45 Distribute and review handout materials

2:00 Discuss the following questions:

- What are some problems with current CIL reporting?
- What kind of information do you need from an assessment to become a more successful center?
- Why is CIL reporting an important tool?

3:00 Teleconference begins

- I. Welcome and introductions
- II. What is outcomes evaluation, and why should CILs do it?
 - A. Problems with standard IL reporting
 - B. How outcomes thinking can clarify the IL vision
 - C. Use of outcomes measurement to improve accountability
 - D. Use of outcomes measurement to support the CIL message
 - E. The benefits of developing a statewide reporting system
- III. Introduction to logic models
 - A. Some models currently in use
 - B. Applying a logic model to your IL programs
 - C. The measurement challenge
- IV. Next steps: Designing your system
 - A. The challenge of developing a statewide reporting system (10 minutes)
 - B. Using the data to evaluate your progress in achieving your program goals
 - C. Effects of outcomes measurement and evaluation on staff

4:30 Fill out your evaluation forms and return them to the NCIL office

About the Trainers

Liz O'Hara has been the Executive Director of the Michigan Association of Centers for Independent Living (MACIL) since 1997. MACIL represents the interests of its twelve member centers at the state and federal level, and provides technical assistance to CILs and to emerging centers. During Liz's tenure at MACIL, the Association has successfully coordinated a drive for an additional \$2 million in State funding for CILs. MACIL has also been actively involved in long-term care reform, collaborating with the Michigan Department of Community Health in a multi-year demonstration project transitioning nursing home residents to the community. MACIL's work applying outcomes measurement and evaluation to IL programs has been presented at the Region V CIL conference. Liz has also presented Michigan's IL outcomes work to members of the Wisconsin Coalition of Independent Living Centers. Prior to her position at MACIL, Liz held a variety of positions in federal, state, and local government, and in a local domestic violence program. She has a Master's Degree in City and Regional Planning from the University of California - Berkeley.

Larry Wanger is currently Program Director at Disability Advocates of Kent County, formerly the Grand Rapids Center for Independent Living. Larry has been with Disability Advocates for nearly six years and has served as Program Director for the past three. Previous to this position, he worked as Business Services Coordinator at Disability Advocates, assisting individuals with job accommodation or discrimination issues under Title I of the Americans with Disabilities Act. Additionally, Larry has served on the Program Evaluation Committee for the Michigan Association of Centers for Independent Living for a number of years, and played a key role in the development of Michigan CIL's outcomes development process and coordinated the development of an Access based database management system (DBMS) which produces outcomes data, the Federal 704 report, our Michigan state reports, and many others specific to each Center for Independent Living.

Trainers

Liz O'Hara

Executive Director
Michigan Assn of Centers for Independent Living
1476 Haslett Road
Haslett, MI 48840
(517) 339-0539 (Phone)
(517) 339-0805 (Fax)
liz@macil.net

Larry Wanger

Program Director
Disability Advocates of Kent County
3600 Camelot Drive SE
Grand Rapids, MI 49546
(616) 949-1100 Phone
(616) 949-7865 Fax
(616) 949-1100 TTY
larry.w@disabilityadvocates.us

IL NET STAFF

ILRU

Lex Frieden
Executive Director
lfrieden@ilru.org

Laurie Gerken Redd
Administrative Coordinator
lredd@ilru.org

Richard Petty
Program Director
repetty@compuserve.com

Dawn Heinsohn
Materials Production Specialist
heinsohn@ilru.org

Laurel Richards
Training Director
lrichards@ilru.org

ILRU Program
2323 S. Shepherd
Suite 1000
Houston, TX 77019
713-520-0232 (V)
713-520-5136 (TTY)
713-520-5785 (FAX)
ilru@ilru.org
<http://www.ilru.org>

NCIL

Anne-Marie Hughey
Executive Director
hughey@ncil.org

Kristy Langbehn
Project Logistics Coordinator
kristy@ncil.org

NCIL
1916 Wilson Boulevard
Suite 209
Arlington, VA 22201
703-525-3406 (V)
703-525-4153 (TTY)
703-525-3409 (FAX)
1-877-525-3400 (V/TTY -
toll free)
ncil@ncil.org
<http://www.ncil.org>

Dustin Stamper
Project Assistant
dustin@ncil.org

ABOUT ILRU

The Independent Living Research Utilization (ILRU) Program was established in 1977 to serve as a national center for information, training, research, and technical assistance for independent living. In the mid-1980's, it began conducting management training programs for executive directors and middle managers of independent living centers in the U.S.

ILRU has developed an extensive set of resource materials on various aspects of independent living, including a comprehensive directory of programs providing independent living services in the U.S. and Canada.

ILRU is a program of TIRR, a nationally recognized, free-standing rehabilitation facility for persons with physical disabilities. TIRR is part of TIRR Systems, a not-for-profit corporation dedicated to providing a continuum of services to individuals with disabilities. Since 1959, TIRR has provided patient care, education, and research to promote the integration of people with physical and cognitive disabilities into all aspects of community living.

ABOUT NCIL

Founded in 1982, the National Council on Independent Living is a membership organization representing independent living centers and individuals with disabilities. NCIL has been instrumental in efforts to standardize requirements for consumer control in management and delivery of services provided through federally-funded independent living centers.

Until 1992, NCIL's efforts to foster consumer control and direction in independent living services through changes in federal legislation and regulations were coordinated through an extensive network and involvement of volunteers from independent living centers and other organizations around the country. Since 1992, NCIL has had a national office in Arlington, Virginia, just minutes by subway or car from the major centers of government in Washington, D.C. While NCIL continues to rely on the commitment and dedication of volunteers from around the country, the establishment of a national office with staff and other resources has strengthened its capacity to serve as the voice for independent living in matters of critical importance in eliminating discrimination and unequal treatment based on disability.

Today, NCIL is a strong voice for independent living in our nation's capital. With your participation, NCIL can deliver the message of independent living to even more people who are charged with the important responsibility of making laws and creating programs designed to assure equal rights for all.

ABOUT THE IL NET

This training program is sponsored by the IL NET, a collaborative project of the Independent Living Research Utilization (ILRU) of Houston and the National Council on Independent Living (NCIL).

The IL NET is a national training and technical assistance project working to strengthen the independent living movement by supporting Centers for Independent Living (CILs) and Statewide Independent Living Councils (SILCs).

IL NET activities include workshops, national teleconferences, technical assistance, on-line information, training materials, fact sheets, and other resource materials on operating, managing, and evaluating centers and SILCs.

The mission of the IL NET is to assist in building strong and effective CILs and SILCs which are led and staffed by people who practice the independent living philosophy.

The IL NET operates with these objectives:

- Assist CILs and SILCs in managing effective organizations by providing a continuum of information, training, and technical assistance.
- Assist CILs and SILCs to become strong community advocates/change agents by providing a continuum of information, training, and technical assistance.
- Assist CILs and SILCs to develop strong, consumer-responsive services by providing a continuum of information, training, and technical assistance.

What Are We Doing & How Well Are We Doing It? Outcomes Measurement & Independent Living

Learning Objectives

Participants will learn:

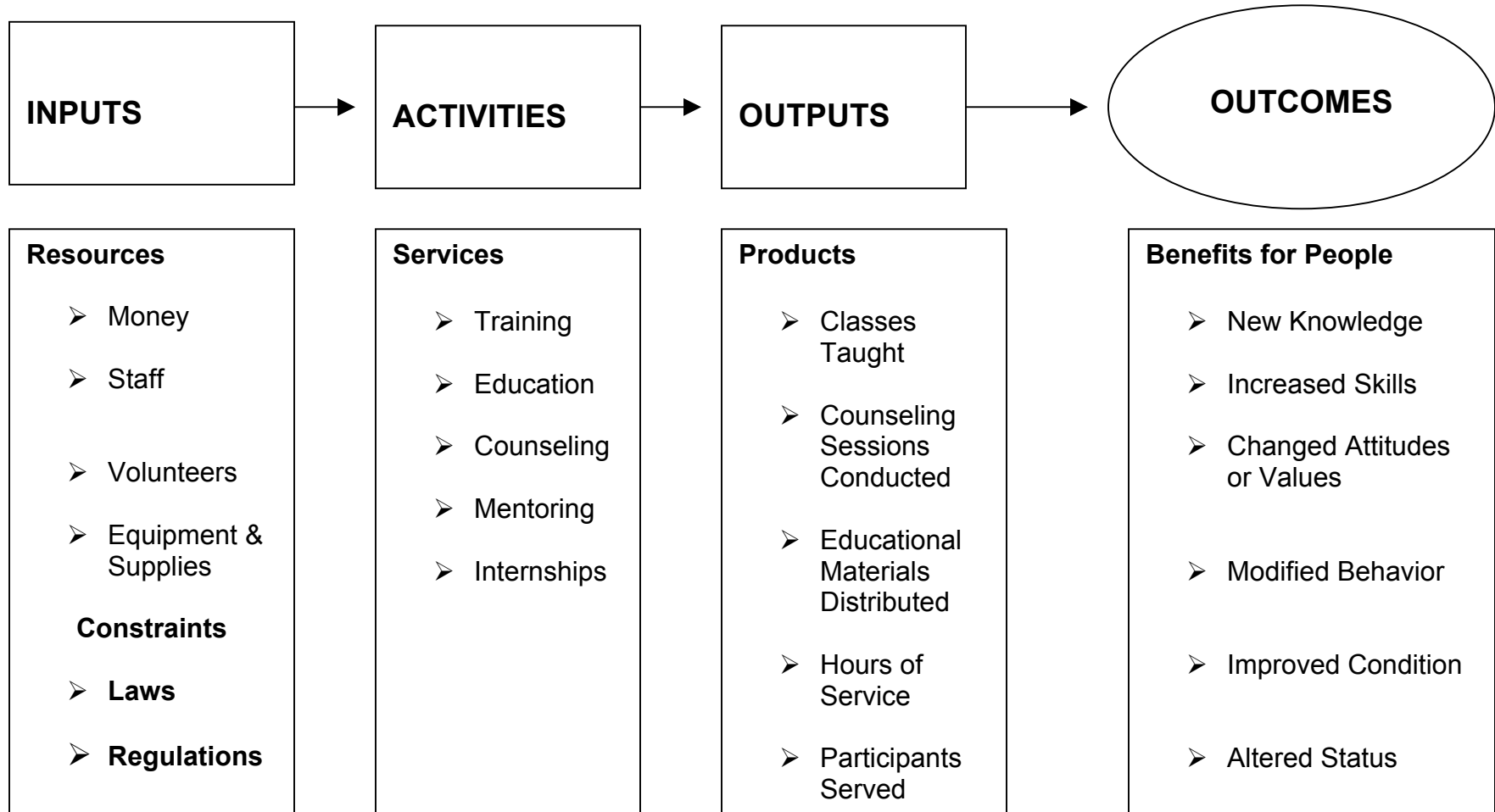
- Problems with Standard IL Reporting
- How outcomes thinking can clarify the IL Vision
- How outcomes measurement improves accountability
- The benefits of developing a statewide reporting system
- How to apply a logic model to your IL programs
- About a successful model currently in use
- The challenges of measurement and developing a statewide reporting system
- About using data to evaluate progress in achieving program goals
- How to train staff in outcomes assessment

Outcomes Introduction

Standard IL Reporting Most CILs regularly keep track of a wide variety of statistics about their services, both for their annual 704 reports and for their own use. Usually these statistics focus on the volume of services rendered or requested. For example, an organization will keep very accurate tallies of *how many* people contacted the center, which services they requested, and which services they received. At the end of the year, organizations will know things like: 100 people in their community received peer counseling, 125 received employment services, 75 received information referral on accessible housing, etc. These totals are often called *outputs*. Many organizations, especially those in the non-profit and service sectors, are finding this sort of *outputs* based information less and less useful as a means of self-assessment. What they really want to know is: Are the desired outcomes – changes in a consumer’s behavior, status of quality of life – being achieved? Have consumers found employment? Have they found accessible housing? Are they receiving the financial assistance they need? Did they find a personal assistant? Did they make it out of the nursing home?

Outcomes are benefits or changes for individuals or populations during or after receiving your services or participating in your programs. They are what participants know, think, or can do; or how they behave; or what their condition is, that is different following the program.

Program Outcome Model



ACCESSIBILITY LOGIC MODEL

	Activity	Initial Outcome	Intermediate Outcome	Long-term Outcome
Individual		Individual has knowledge and resources to advocate for accessibility	Individual secures support to access goods and services	Individual has enhanced accessibility of home/apartment
Group		Consumers and groups learn advocacy skills	Groups advocate for accessibility Groups provide assistance in creating access	PWD have equal access to the community
CIL	IL support/skill training, peer support and mentoring, I & R, individual and systems advocacy regarding accessibility			
System		Government, public, and private entities value accessibility	Government, public, and private entities modify architectural plan or physical structure for increased accessibility Government, public, and private entities modify program/service to assure access	
Community		Community is aware of the need for and the value of accessibility and of related laws (white cane, parking)	Communities plan for and implement modifications for increased accessibility	Community is barrier free

EMPLOYMENT LOGIC MODEL

	Activity	Initial Outcome	Intermediate Outcome	Long-term Outcome
Individual		Individual increases work skills and/or knowledge of rights and responsibilities	Individual obtains employment Individual maintains employment Individual returns to work	Persons with disabilities are employed
Group		Consumer groups and others increase knowledge of employment issues and laws	Consumer and community groups advocate for increased work incentives	
CIL	Provide peer support, individual and systems advocacy/community education, IL support/skill training, I&R			
System		Legislators understand and value work incentives	Legislators remove work disincentives Agencies provide effective employment supports to PWDs	Systems effectively support employment of persons with disabilities
Community		Employer is educated Employers value PWDs as employees	Employer provides reasonable accommodations	Work environments effectively support persons with disabilities

HOUSING LOGIC MODEL

	Activity	Initial Outcome	Intermediate Outcome	Long-term Outcome
Individual		Have knowledge of existing housing options Have knowledge of housing rights and responsibilities	Individuals acquire affordable, accessible housing that maximizes independence Individuals secure compliance with fair housing	Persons with disabilities maintain affordable, accessible housing that maximizes independence
Group		Consumers and disability groups learn advocacy skills	Consumers and disability groups advocate for and acquire affordable, accessible housing	
CIL	Provide peer support, IL support/skill training, I&R, individual and systems advocacy and community education regarding housing			
System		Legislators understand need for housing	Gov't enforces existing housing accessibility laws and rules Legislators act to increase affordable, accessible housing	
Community		Public is aware of the shortage of affordable, accessible housing and the hardship it creates in the community	The community increases the number of accessible, affordable housing	Affordable, accessible housing in sufficient quantity is available to persons with disabilities

ONGOING COMMUNITY SUPPORTS LOGIC MODEL

	Activity	Initial Outcome	Intermediate Outcome	Long-term Outcome
Individual		Individual increases awareness of community living options, rights, and skills through person-centered planning	Individual moves from institution to community Individual is prevented from moving to institution Individual acquires PA Individual acquires PASREP	Individual maintains community living
Group		Families value and believe in success of community living The group acquires advocacy and systems change skills	Families and current and former nursing home residents advocate for increases in living options Current and former nursing home residents provide peer support Families provide support	
CIL	Provide IL support/skill training, I&R, peer support, individual and systems advocacy			
System		People who run systems are aware of cost savings and other advantages to community living for persons with disabilities	Agencies implement rules and regulations consistently Legislators pass laws that support increased options in community living	Options for in-home care are affordable and available
Community		Communities value independent living and choice Community increases awareness of LTC options and issues	Communities provide supports for persons with disabilities living in the community	Community supports are available and affordable

TRANSITION LOGIC MODEL

	Activity	Initial Outcome	Intermediate Outcome	Long-term Outcome
Individual		Youth increase social, advocacy, and leadership skills → Youth increase knowledge of career preparation and rights and responsibilities	Youth engage in career preparation Youth demonstrate life skills Youth self-advocate for transition plans and supports	Youth with disabilities transition successfully to employment, education, and/or community
Group		Parents increase knowledge of rights and responsibilities (IDEA, IEP, etc.) Parents value full participation	Parents support student's goals and attend IEP Parents work with community agencies to support student transition process	
CIL	Provide peer support and mentoring, IL supports and skill development, I&R, and advocacy and education regarding transition			
System		Schools value inclusion of youth with disabilities into career prep Schools believe that collaboration with community organizations is necessary for successful transition for youth with disabilities	Schools plan for and offer youth with disabilities access to all career prep services Schools collaborate with CIL, MRS, and other community organizations to provide transition services	Youth with disabilities have full access with accommodations to regular career prep training/services
Community		Communities value collaboration	Communities provide a network of transition-related supports	Youth with disabilities have access to a network of transition supports

TRANSPORTATION LOGIC MODEL

	Activity	Initial Outcome	Intermediate Outcome	Long-term Outcome
Individual		P/W/D know about transit options and have the skills to use them	P/W/D acquire access to transportation	P/W/D can travel in communities at will
Group		P/W/D and disability groups gain skills for transit advocacy	P/W/D and disability groups advocate for timely, affordable accessible transportation services	
CIL	Advocacy/community education, peer support, IL supports/skill development, and I & R			
System		Transportation providers and legislators understand the importance of quality transportation services for PWD Government and providers are knowledgeable about laws regarding transit	Transportation providers expand service hours; increase accessibility, or expand services geographically Government enforces transportation laws re: accessibility, availability, affordability	
Community		Community believes that public transit is valuable for everyone	Public supports funding for affordable, accessible, effective transportation	Affordable, accessible, effective public transportation systems exist

Taking Up the Challenge: How to Build a System That Works for Everyone

Determine who is interested in building an outcomes evaluation system, and why.

Is there enough interest in building a statewide system? This makes the most sense if you are trying to strengthen your message to your State Legislature, other major funders, and the general public. There has to be a broad--and *deep*--commitment by your network of CILs, though, because building statewide consensus on the system design is complicated and time-consuming.

Build a team of committed CIL staff who are knowledgeable about current reporting requirements, and about a broad range of CIL programs. Whether you are building a statewide system or one for your CIL only, the idea must have strong support from key staff, *including CIL Directors*. Team members will have to commit several hours a month (more at the start), over a long period of time, on a regular basis, to working through such issues as selection of outcomes and indicators, appropriate software, staff training needs, quality assurance, etc. The team should include both technically competent staff and "big picture" people. Strong leadership is essential.

Share what you are doing with the people who are eventually going to have to make it work. Hold staff trainings *and work sessions* on outcomes evaluation. Encourage "big picture" thinking: what would the world look like if IL were a reality? How would people with disabilities feel about themselves? How would they behave? What would their life be like? How would people in the broader community feel and behave? How does that vision relate to the day-to-day work of CILs? ***Go through the exercise of creating logic models with CIL staff from various programs.*** Take the time to review the models, get comments, and make revisions. Failure to secure understanding and buy-in from staff invites failure.

Select the principal program outcomes on which your reports will focus. If this is a statewide effort, try to work with outcomes that most, if not all, CILs generate: enhanced accessibility through removal of architectural or other barriers, acquisition of job or job-seeking skills, securing employment, nursing home transitions, etc. Secure the input of all CIL staff on proposed outcomes, but face the brutal fact that you cannot capture everything that CILs do. Deal with fears of unfair comparisons among CILs, and with hurt feelings that a "pet program" is not included. Make room in a statewide system for individualized reporting by CILs. Consider the political benefit of reporting on particular outcomes.

Identify indicators of successful outcomes and the data source for those indicators. Consider carefully how to provide for consistency in entering data. (What constitutes a successful employment outcome? What if a consumer who was transitioned out of a nursing home dies or moves back in?)

Design the reporting system to address all reporting needs, including outputs reporting for the feds, United Way funding, etc. Make sure your software provides the flexibility you need. Allow plenty of time for test runs and debugging, as well as for staff training. ***Consider how the data could support statewide or local public relations efforts, and make sure the system accommodates your needs in this regard. Consider how the data will be used to review and revise program goals, strengthen program management, and evaluate program success.***

Design the system to provide public reports on activities and outputs to the extent necessary. For example, the number of people served by your CIL is an output, but is of general interest. The number of calls from people needing help with housing may or may not be a useful indicator of community need.

Take stock at regular intervals. Are there sources of constant confusion in data entry? Are there outcomes that should be added or dropped? How is the software working? Are timeframes for submission of reports reasonable?

Don't be discouraged! Don't be inflexible! Don't be a perfectionist! A good system will take time and a lot of compromises, and it will never be perfect. The rewards, though, are potentially very great.

Resources

Accountable Good: Program Evaluation in the Nonprofit Sector.

68 pp., 1999. Rachel A. Spiegel.

Administration of Children and Families (ACF) Child Outcomes Research and Evaluation. Publications and Reports.

Agency Experiences with Outcome Measurement: Survey Results.

16 pp., 2000. United Way of America, Alexandria, VA.

An Agenda for Action: Outcome Management in Non-Profit Organizations.

21 pp., 2000. Harry Hatry and Linda Lampkin. Order from the Urban Institute Press

Evaluating Nonprofit Effectiveness: Overcoming the Barriers

1993 Taylor, M. E., and Sumariwalla, R. D Jossey-Bass Publishers.

Guide to Program Outcome Measurement for the US Department of Education.

Urban Institute Research Paper. 43 pp., Reprint, 1998. Harry Hatry and Mary Kopczynski, The Urban Institute, Washington, DC.

Impact on Children in Experimental Studies of Welfare-to-Work Programs.

87 pp., 2001. Martha Zaslow, Jennifer L. Brooks, Kristin A. Moore, Pamela Morris, Kathryn Tout, Zakia Redd. Washington D.C.: Child Trends.

Introducing Outcomes: Basic Definitions and Concepts in Program Outcome Measurement. (Video) 1999. United Way of America, Alexandria, VA.

Logic Models in Real Life: After School at the YMCA of Asheville.

The Evaluation Exchange, Vol. VII, No. 2, page 13-14. Spring 2001. Harvard Family Research Project, Harvard University, Cambridge, MA.

Look at Outcome Measurement in Nonprofit Agencies.

2000. Elaine Morley, Elisa Winson, & Harry Hatry. The Urban Institute, Washington, DC.

Making a Difference: An Impact Study of Big Brothers/ Big Sisters.

58 pp. 2000. Joseph Tierney and Jean Crossman.

Management Indicators in Nonprofit Organizations: Guidelines to Selection and Implementation. 1984 Elkin, R., and Molitor, M., University of Maryland, School of Social Work and Community Planning.

Managing the Transition to Outcome-Based Planning and Evaluation.

42 pp., 1998. Judith Clegg, Dawn Hanson Smart, Jane Reisman, and Barbara Gurley. The Evaluation Forum, Seattle, WA.

Measuring What Matters in Non-Profits.

John Sawhill and David Williamson

Monitoring the Outcomes of Economic Development Programs. A Manual.

199 pp., 1990. Harry P. Hatry, Mark Fall, Thomas O. Singer, E. Blaine Liner. The Urban Institute, Washington, DC.

Outcome and Performance Measurement Systems: An Overview.

Michael Campbell. Alliance for Redesigning Government, National Academy of Public Administration.

Outcomes and the Factors which Influence Their Realization: A Synthesis of Forty-Two Completed Project Case Studies. 7 pp., 2000. Sarah Earl. International Development Research Centre Evaluation Unit (IDRC), Ottawa, Ontario, Canada.

Outcome Mapping: Building Learning and Reflection into Development Programs.

120 pp., 2001. Sarah Earl, Fred Carden, and Terry Smutylo. IDRC Evaluation Unit, Ottawa, Ontario, Canada.

Outcome Measures for Child Welfare Services. Theory and Applications.

1986. S. Magura & B. Moses. Child Welfare League of America, Washington, D.C. To order by phone, call 1-800/407-6273 or visit the web site.

Outcome Measures for Public Child Welfare.

17 pp., 1995. Patricia Schene. The Center for Human Investment Policy, University of Colorado, Denver.

Outcome Measurement Activities of National Health and Human Service Organizations. 31 pp., 1998. United Way of America, Alexandria, VA.

Outcome Measurement: Are You Making a Difference?

(Video) 2000. United Way of America

Outcome Measurement in Nonprofit Organizations: Current Practices and Recommendations. 46 pp., 2001. Elaine Morley, Elisa Vinson, and Harry P. Hatry. Independent Sector and The Urban Institute.

Outcome Measurement in the Human Services. Crosscutting Issues and Methods.

342 pp., 1997. Edward J. Mullen and Jennifer L. Magnabosco. To order, write NASW Press, P.O. Box 431, Annapolis Junction, MD 20701 or call 1/800-227-3590 or 1/800-638-8779 or visit the NASW Press web site.

Outcome Measurement: Showing Results in the Nonprofit Sector.

11 pp., 1997. Margaret C. Plantz, Martha T. Greenway, and Michael Hendreicks. New Directions for Evaluation: Using Performance Measurement to Improve Public and Nonprofit Programs.

Performance Measurement: Getting Results.

Urban Institute Research Paper. 286 pp., 1999. Harry P. Hatry. The Urban Institute, Washington, DC, PUB ID #209105.

Perspectives on Outcome-Based Evaluation for Libraries and Museums.

26 pp. Stephen Weil and Peggy Rudd. Institute of Museums and Library Services, Washington, DC.

Program Evaluation: Guidelines for Development and Implementation.

1994. Goodwill Industries International, 1994.

The Case for Shifting to Results-Based Accountability.

14 pp., 1994. Center for the Study of Social Policy, Washington, DC.

The Outcome Based Performance Measures: A Procedures Manual.

1995. Accreditation Council on Services for People with Disabilities.

Using Software Systems to Measure Non-Profit Program Outcomes: Assessing the Benefits and Barriers for Strategic Management. Michael Collins.