**Part 1: High‑Performance Measurement Framework for SILCs**

**Presented by Sheri Chaney Jones and Jeremy Morris**

**July 17, 2019; 3:00 p.m. EDT**

>> PAULA McELWEE: Good afternoon, everyone. Welcome to today's webinar. We're going to talk about high‑performance measurement framework. This is actually the first of several on this topic. I'm Paula McElwee with ILRU, and today's presentation is being brought to you by the IL‑NET training and technical assistance project. That project is for both centers and SILCs, Statewide Independent Living Councils and the IL‑NET is operated through a partnership among Independent Living Research Utilization, ILRU, National Council On Independent Living, NCIL, the association of programs for rural Independent Living, APRIL, and Utah State University center for persons with disabilities. With support provided by the Administration On Community Living and the U.S. Department of Health and Human Services. This webinar is being recorded, and it will be available on demand on our website in a few days. You can go to ILRU.org where you will find all of the material for the presentation, including the PowerPoint, the audio, the transcript, and any other supplemental materials that may be posted after this presentation. Today you'll have an opportunity to ask questions at several points during the webinar. If you move your cursor on your screen, you should be able to see a bar at the bottom of the slide that's up there for you now, and there in the middle is one of the options called Q&A, questions and answers. And you can use that to type in a question at any time during the presentation and then we'll address it when we break for questions and answers. If you have a comment for us that is not a question, you're welcome to use the chat box. So that chat feature is also found on that bar at the bottom of your screen. Captioning is also available. You can open the tab that says CC on the main screen and know that with captioning you can change the size of it. So what will pop up immediately for you is not identical to what you will see you can change it to suit you by putting your cursor over it and then you will see the arrow and you can click that arrow and make the captioning larger and you can display more than just one line of text if you want to do that. Or you can view full‑screen captioning. You're welcome to log on to the chat and there into your questions and we'll respond to them during our breaks as well. That's for the people who are following the captioning. You can find the URL on the chat on the main webinar screen. That is streamtext.net/player?event=ILRU. I'll ask Sharon to put that in the chat.

I would like to now introduce our presenters for this particular webinar and tell you a little bit about each one of them as we do. Sheri Chaney Jones is going to lead off for a bit. She is the president of measurement resources company and for over 19 years she has improved government agencies, nonprofits and small businesses using performance management evaluation and organizational behavior best practices. Her experience and expertise has transformed measurement cultures and as a result saved public dollars, improved outcomes, demonstrated effectiveness and increased revenues. Prior to founding the company, the measurement resources company, in 2010, her work as the performance center manager with the Ohio department of aging saved the state of Ohio over $250 million in annual Medicaid costs with the creation of a long‑term care savings calculator. Sheri is the author of "impact and excellence," "data driven strategies jeez for aligning mission, culture and performance in nonprofit and governmental organizations published in 2014. At the Ohio State university Sheri taught a course on creating measurement cultures as a part of a certified public manager's program. She earned her masters in industrial and organizational psychology from Central Michigan University and her BS with distinction in psychology from Ohio State university. That brings me to also mention who Jeremy is. Jeremy is Executive Director of the Ohio SILC and he will be participating in some of this discussion because the Ohio SILC contracted with this organization to do some statewide things for measurement to enhance the message from SILCs to the statewide situation. So I'm going to turn it over to you now, Sheri. All yours.

>> SHERI CHANEY JONES: Great. Thanks, Paula. I'm so grateful and excited to be with you all today to talk about measurement cultures. I know Paula was so gracious to use a lot of jargon in my bio. I need to rewrite that bio and give you more insight in what those words mean, what I meant when she talked about a measurement culture and the work of the Ohio State Independent Living Council and their IL Networking and what they did. So we're going to demystify some of those words for you today.

The goals that we have in this webinar series is to really talk about how to create a high performing measurement culture within your Independent Living network, the importance of having a statewide independent logic model for success. So we'll talk about what that is, what that looks like. Why you might want one. We're also going to talk about why this is so important to attract funders and to use data to attract funders, as well as how to create the perfect customized statewide measurement framework. And talk about impactful data‑driven communication strategies using data. Don't worry, we're not going to be able to cover all of that in webinar 1. That's why this is a three‑part series ‑‑ webinar series, and I'm so grateful to be able to share all this content with you over the next three webinar series.

So let's dive in. Why measurement? Why is it important for us to think about measurement? Well, it all comes down to your vision, and data, and measurement, and how you tell your story, it's a means to an end, and the end is that vision. The work that the Independent Living networks do, and I have been grateful to work with Ohio Statewide Independent Living Council plus some other Independent Living agencies across the state of Ohio and in Canada and elsewhere across the country, and the work that your organizations are doing to increase the quality of life and the independence and the choice of those individuals living with disabilities across our communities in this country is so important. And as I've gotten to work with many of you and learn more about your vision, I know you have this amazing vision of inclusive societies reduction of discrimination and accessibility policies and really having these communities where everybody can thrive regardless of their abilities. And so that's why we're here today, to talk about a measurement framework. It's because of that vision. It's because what your organization, what the statewide Independent Living [indiscernible] could do, what they would look like if you were 100% successful. If you were 100% resourced, you had all of the resources and the money you needed to do your work.

So Paula did a great job introducing who I am. The president and founder of measurement resources company and we work with government, nonprofit organizations all across the country to help them really define the right metrics and use that data to tell their story and solve very complicated social problems. So for those of you who are able to access the slides or looking at the slides, you can see this slide just has different logos much organizations that we've worked with. We've worked with federal government, the DC ‑‑ the City of DC. A lot of programs within the state of Ohio. Cities. So it's just ‑‑ a variety of organizations across the country.

To ground us in the webinar today I want to spend some time being reflective and I want everybody on the webinar today to take a moment. If you are at a place where you have some paper and a pencil or have some space to think, I do want you to be prepared to answer this question, and if you are using the chat ‑‑ we won't open it up for Q&A at this moment, but if you do have access to the chat, I would love for you to chat your answers to this question. So Peter Drucker, who I perceive as the grandfather of management theory and organizational research, he has given us some great advice. What he shares with us is we're planning for uncertainty. We have to ask ourselves: What has already happened that will create the future? As I give this presentation across the country, people generally agree with me that we are in a state of uncertainty with the rapid changes in technology, with different ‑‑ from a very big political spectrum and the polarization and the different ‑‑ just the ideas and social media and all the different things that are going on in our communities. It's like the seed in which change occurs is much faster than it used to, and trying to sift through what we should be reacting to and what we shouldn't, because it's changed a little bit than in previous generations. And so what I want you to think about in your own organizations right now, what has already happened that will create your future if you don't do anything about it? Sometimes these things are maybe very internal to your IL Network. You could be ‑‑ it could be leader changes, or funding shifts. It could be the aging population. It could be just different population or needs of the communities. It could be things ‑‑ you know, policy changes within your state, attitude changes within your state, or even at the federal level, different policies, funding, different streams that are impacting your work. And so if you wouldn't mind just to give me a hint of what's on your mind here in terms of what are those things that are going on within your IL network and full didn't do anything with them, they will create your future. They're going ‑‑ maybe they're good, maybe they're bad, but you know that they have happened and they're going to predict a future for you. So go ahead and just type some things in the chat if you wouldn't mind. I have access to it. Just type your ‑‑ the things that will create your future.

While you're doing that I'm going to move on and share with you the things that I've seen. So one of the things across the country, there has been a really gradual shift in how funding decisions are made, and I think that it's happened ‑‑ it's starting to happen a little bit more rapidly, but about a decade ago when I launched measurement resources I saw this trend happening, but it wasn't as significant as it is today, and that is that funding bodies are moving towards paper performance ‑‑ pay for performance contracts. There is the sip raw at the federal level. I know Ohio just came out with Results Ohio, which is also going to be a pilot for pay for performance type of statewide funding model. So we've really changed the way we make decisions. Policymakers and even funders are now making decisions. Instead of just thinking and asking, oh, you do good, they're really looking for you to prove it. They really want organizations to prove an arguable value, and I will talk about that a little bit more.

Let's see what type of things we said. So we have funding to start a new CIL in the state. That is something that will create the future. That's a great thing. And then technology and how technology is touching everyone's life. And in a lot of ways, advances in technology are helping accessibility in a way that it never has, which is it's really great but we need to understand how do we get those technologies to the right people, how do we make sure we have equity and access and all that stuff. And so when we talk about being able to prove an arguable value and really understanding why this measurement culture is so important, I want to share something with you that you may have never thought about, and as I've been sharing this with more and more audiences, they haven't really thought about their work in this way. So one of the things that's also happening is that there is a move from people wanting just fiscal high performance. So, do you have the resources we have given you and are you complying with those resources and, great, we'll continue to fund you, to a balance of mission and fiscal high performance. So let me really explain this ‑‑ unpack this for you, because this is the framework ‑‑ if you think about why the shift is made, this will help you see how this goes.

So as Paula mentioned, I'm an industrial organization psychologist by training and so one of the questions I have been wrestling with over my past 20 year career in the social sector, in government, nonprofit organizations, is really thinking, is high performance in the social sector, if we're going to create high performing cultures in our organizations, in our state Independent Living networks, is it the same as the private sector? Is what we should be doing is reading all the leadership books we can, and management theory as we, and taking all those best practices and putting them into our own organizations? Is that ‑‑ is that the answer? And my conclusion is, yes, but it's also a little bit more complicated. And so let me explain to you why it's more complicated, and it's very important that we all kind of understand why it's more complicated and we communicate that to our board members, definitely to those people in the community or that we're working with, educate them on this model and why we need to have measures of mission and fiscal high performance to really see the social change we want to have as well as having the sustainable and fiscal operations in our organizations. So let's look at this model here, if you have the ability to see the screen. Great. If not, I will be walking through each element as well. So you'll be able to follow along here.

So in in the social sector we have two groups. First we have the consumers ‑‑ a community has problems but they have limited resources. So let's take the IL Network. We have individuals living with disabilities who need help with transportation. They need help with transition services, maybe getting them set up so they do not have to live in a nursing home and they can live independently. Maybe they just need some home mod faux Kay indications or home repairs to help them live independently. Maybe they need help or assistance in finding employment or accommodations. The communities needed advocates to have more inclusive and accessible communities. So these are the problems that the IL Network is solving for our commune. So you have the expertise. You have the knowledge. You have the programs. You have the solutions to help individuals living with disabilities or communities who want to be more accessible. You have the solutions to those problems.

Now, the reason that you're not all giant big businesses now, for‑profit entities, is because there's limited resources for you to sustain yourself a hundred percent from a private pay model. So if there was enough resources to go around where you could just charge for those services and people paid a certain percentage, then you would not need taxpayer dollars. You would not need funding. You would be a for‑profit organizations. And some of you probably have social enterprises or pay per contract type programs where that's true.

Now, the other side is ‑‑ but most of you, most IL networks, most nonprofits and government agencies, they have to rely on taxpayers and corporations because they have the money. So what we see then is that what historically has happened is we've been managing to the taxpayer, the corporation with the money. So nonprofits, government agencies, they're writing grants. They're lobbying their legislature for more money. And so they're building those relationships. They're writing grants to get the funding. They win the grants and they're compliant with the funding requirements. They might be good at marketing, grant writing. And so they have evidence of fiscal sustainability and evidence of fiscal high performance, and that's the traditional model. However, if we just focus on evidence of fiscal performance, meaning we have enough resources in our budget to do our work, we are missing the entire reason we're in business. Just because we have a lot of money does not mean we're doing any good. It does not mean we're creating social change.

The story ‑‑ my first kind of professional grown‑up job was the deputy director of performance evaluation for the Franklin County domestic and juvenile courts. And in this role I was to evaluate the impact of one of our programs, and what I found is that we were making kids worse. So for me this ‑‑ 20 years ago or so when I first did this research, this is what awoke this passion in me to say we've got to be doing better of making sure we are looking at our mission high performance, too. So let me walk you down that chain. So we have consumers that have an issue or communities that have an issue. We have the solution. So then those communities, those consumers, they engage our services. Now they're better off. They have greater independence. We have more accessible communities. We have more choice, better healthcare, whatever those outcomes are that you're looking to improve. Now we have evidence of social mission high performance. So it's a "yes and." We need measures of both to drive success. Really where the framework for today is talking about, is around how do we prove our unarguable value, that no legislature, that no Congress, that no taxpayer would ever look at our budget and our line items and say let's cut it, because we have been able to prove our public value to our communities, to our states, to the federal government that it makes good business sense, good government sense, good social impact sense to continue to fundus.

Here is an example of where I want to move you by creating these measurement frameworks. So think about your funder, your decision maker, and you're deciding between two grant applications. You have program X. They provide Independent Living Services to 3,000 adults living with disabilities. Great. That sounds like they're having good impact. They're serving 3,000 people. That's a lot of people. Okay. That sounds good. Now let's look at program Y. Because of our Independent Living Services to 3,000 adults living with disabilities, 100% of consumers report that their needs are met, and 71% successfully lived independently for 365 days. So we've got ‑‑ we can prove that everybody we serve said, yes, you've met my needs. 71% we've kept in the community for 365 days. And then you go on to say, and for every $16,000 donated we can keep one person in their own home for one year, which is a $19,000 savings to the state of Ohio or whatever state you're in. And it's a 118% return on your investment. So that's the kind of story a measurement framework will allow you to tell. I want you to think about, one, can you currently tell that story with your organizations. And, two, what would it mean for you if you could tell that story collectively about all of the Independent Living work going on in your state? So if we want to move to a high performing culture, we want to have measures of mission high performance and fiscal high performance, change is the only way to succeed. And we only have two choices. The firsts choice is we can ignore this trend that's happening, we can ignore the shift in the way funding bodies are making decisions, and we'll get knocked down into a Valley. This is an image of a bridge over kind of a ‑‑ two valleys and a river, and so you could fall down into the cliff and be ‑‑ find yourself at the bottom of the Valley and have to climb up the mountain. You know, there's peaks and valleys in life all the time, and that's definitely an approach we can take as organizations. But that's not what I want for you. I want you to build a bridge across this divide, and how we're going to do that is by creating these high performing cultures and the change in our mission to prove our mission and miss cull high performance. It might be scary and difficult because you have to cross the bridge and it might be high over this Valley and scary a and a little rickety. But it will be quicker than the alternative. So these three‑part webinar series is all about giving you the tools and the things to think about and the things to consider to create those high performing measurement cultures within your IL‑Net works and how a framework would help you.

So the solution, the bridge, if you will, is the creation of these high performing measurement cultures, and if you've never heard this term before, then that's okay. I invented it in some way in my book, but what a high performing measurement culture is, it's having measures aligned with your mission, so aligned with the fiscal and mission I performance measures, and they're using them to make decisions. So you're strategically using those data points to make organizational decisions, and that is essentially what a high performing culture is, is that you have these measures in line with your mission and using it to make decision.

So in the intro Paula mentioned I used work for the Ohio Department of Aging, and I was their performance center manager, and in that period in time I was extremely happy to be helping use data to help improve programs for seniors and individuals with disabilities and making sure they have choice, independence and quality of life. And unfortunately I was working in state government during a very uncertain time, back in 2008. If any of you also were around federal or state government around that time I'm very, very sorry. It was a challenging time, especially in the state of Ohio. We had very, very large budget deficits. The way we were going to deal with that was the programs had been asked to just cut, make as many cuts as possible, 30% cuts. I mean, very, very, very severe cuts to deal with this deficit. And in Ohio we had a program called the passport program which kept seniors in their own homes. It was a Medicaid waiver program, and so if ‑‑ if an individual qualified for Medicaid and also qualified for nursing home level care, then we had these dollars that would keep that individual in their homes by providing home‑based care. But the challenge during that time was that was an entitlement program, meaning that in law if someone did qualify for Medicaid and nursing home levels of care, they had the right to move to a nursing home and the state had to pay for it through Medicaid dollars. The waiver program was optional, so it could be cut. Whereas the nursing home program could not be cut. And so the legislatures was really looking at slashing this passport program. At the time I was thinking this doesn't make sense, it's not ‑‑ one, it's not for seniors, this is not what they want. Two, we know health outcomes are better when people are living in their own homes, they have better quality of life when living in their homes, and it also costs the state a lot more money to serve someone in a nursing home than in their own home. So that's how I created as Paula mentioned this long‑term savings calculator which proved that the passport program saved the state $250 million a year and it was this interactive tool where policymakers could look at it and say, okay, if I cut the budget by X percent, what will the outcomes be? How much money will it cost the state and how many seniors will be impacted? And so this is ‑‑ I'm building up here, but this is the story. So this story, as I ‑‑ and then so my director, Barbara Riley, was a high performing leader. Absolutely an amazing woman, high performing leader. She was willing to share this research, this long‑term care savings calculator with the Governor's office, the media, the legislature, anyone who would listen to really show the impact of these home and community‑based services and the importance of our work in the state of Ohio. As a result, we got our money back. We didn't quite get enough political pressure prior to the budget being passed, but within 10 months we had our funding fully restored, and I don't know about all the other states, but in the state of Ohio, it's almost impossible to get money until the next two‑year budget cycle.

So it was a huge win, but it was also for me a huge life‑changing moment because I looked around at my sister agencies and the organizations we were funding and I had to ask the question, why aren't more organizations doing this? Why are not more organizations talking about their mission high performance and really proving their unarguable value to ensure that they were ‑‑ did not end up on the budget cutting block. And I felt the call to serve as many organizations as possible, not just one, and so that's really the story behind the book "impact & excellence" that a lot of this data and this research and everything I'm sharing with you today comes from. And so at that time I felt this call, like said, to start measurement resources, but I had no idea how to manage a business, grow a business, how would I get clients. It just ‑‑ at the time I was a researcher, state government employee. That was my mental mindset. So I had to figure out how was I going to translate what I knew into this world that I now know very, very well. So what I did is I did what all of you would do. I launched and unfunded market research study. I created what was called the measurement culture survey which looked at how do organizations, what data do they have, how are they using that information, and what results were they getting. And I sent that to about 200 organizations, and in exchange for their information they got a customized report that compared them to everybody else in the sample. And the results that I found from that very first study basically proved to me that, yes, you should be doing this, but also the results spoke to me and they said if these results are true, then every nonprofit, government, social change agent in the country has to know this data preponderance and so I did the next thing you would all do. I launched and Ann unfunded national study where I found some partners, sent it out through their networks and got a sample large enough where I was convinced these results actually held up. And so all the results are highlighted in "Impact & Excellence," and I will share many of them with you today about creating the ‑‑ the importance and why it can't be a luxury, why it can't be a nice to have and why it has to be something that you just do for your organizations and your systems. So here are the results, if you're looking at slides or have this slide, it's on slide 15. This is the data and this is probably one of the only few slides that actually has data. So I'll do my best to talk it through everyone in case you're just listening in on the call. But the results that I found in "Impact & Excellence," and got me to where I am to be in front of you today through your computers is this. There were three types of organization in our sample we had high measurement culture organizations. Those were organizations that had data aligned with their mission and were using those data strategically in management decisions. Then we had our moderate culture organizations and those were organizations who had data aligned with their mission but they were not using it strategically in decisions. What they were doing with that information is made a grant required it, a funder required it, collecting it and sending it off. But they were not strategically using it and had no real system for using it. Our third types of organizations were our local organizations which had no data line with their mission, they weren't using data to make decisions. So we have our moderate ‑‑ our high, our moderate and low culture organizations. And across the board what we found is that our high cultural organizations were significantly more likely to have the things that our boards and ourselves want for our organizations. They had increased sufficient sees. They had increased external relationships. Those are things like relationships with the media, partner agencies, policymakers, funders, grantors. They were significantly more likely to have better relationships. They were also more likely to have better internal relationships. They had better communication, cooperation, collaboration and they also had increased revenues. They had seen more increased revenues than the moderate and low culture organizations. And so how you would read this, if you're looking at the slide, so under efficiencies, you would see that 87% of high culture organizations had improved efficiencies. 37% of moderate culture organizations had efficiencies. And 12% of low culture organizations had efficiencies. And so for most of the organizational outcomes we're looking at, high culture organizations, about 80% or more had the things ‑‑ had improvements in efficiencies, external relationships and internal relationships, versus less than half our moderate culture organizations. And when we looked at increased funding, it wasn't quite as high. 62% of high culture organizations had increased revenue versus 18% of moderate and 12% of low. So you can see how ‑‑ it matters. This matters to the success. It's not a nice to have. It's a have to have.

What really surprised me, this particular data, it's not what surprised me. It validated my hypothesis that this matters this, contributed to success, but this is the data that really got me fired up, gets me all over the country talking to groups like yours because only 25% of government and nonprofit organizations have created high performing measurement cultures. The majority, 75%, are moderate to low. So the thing that's going to get us there, the thing that's going to get us to have more money, to have better impact, have greater efficiencies, have better relationships, only 25% of organizations created. So that's what inspires me. That's my why. You have your why's. I have my why's. It's to flip that. I believe that 75% of government and nonprofit organizations should be high performing and the other 25% are finding their way there.

What I'm going to do now is pause because I have thrown a lot of data and information and great stuff at you. So I'm going to give you a chance to ask any questions you may have of me before I move on to the next section.

>> PAULA McELWEE: Great. Well, that brings us, then, to our next ‑‑ for our first Q&A for this group. If you would type that in ‑‑ remember, you can find that Q&A tab at the bottom of your screen. Just run your cursor across your screen and it should pop up. And type in any questions that you have in that box and I'll voice them for the group. And if you want to put it in the chat, you can do that as well. Sharon, you would be interested to know that one of the people on the call recognized that bridge and that Valley and it's the New River gorge in Fayette county, Virginia. You never know what you're going to learn on these things from the group. But we want to any questions any of you have about what Sheri said so far. She is going to go into more, of course, detail how to begin to do this as we go forward, but what are your questions so far? And I have one while we're waiting for everybody else.

>> SHERI CHANEY JONES: Okay, great.

>> PAULA McELWEE: I want to kind of tie this back, what you are saying, to the conversation we've had a lot in Independent Living around something called the 704 report or the PPR, the program progress report is going to be the new name. I think most of us have been in discussions where we've said, you know, what good is this report doing us? It tells us numbers. But it doesn't tell us outcomes. And I'm just curious, are there ways we can use any of those numbers to also find outcomes. You know, that 704 report ‑‑

>> SHERI CHANEY JONES: What we've noticed is that ‑‑ yeah, I don't know ‑‑ I know you have to do that report. That's your funder saying you have to do that report. That is that typically organizations, 89% of organizations, have the data that they need, or at least pieces of the data they need. And, really, sometimes what they need to do is look at it strategically and how do we use these in terms of looking at ratios or combining what you have in your 7 row 4 reports with some 704 reports with other data you are I capturing to make this data more meaningful. As we good to Jeremy's section, I would love to hear from him how much of the information they are collecting is already on the 704 report and what they had to do extra in terms of being able to talk about outcomes, impact.

>> PAULA McELWEE: Because I think we can all get our minds around that data, but we can't always get our minds around what else are we going to do. So it's a starting point, maybe. But it is a lot of numbers. More numbers than it is outcomes. Are it's that first example you gave of 3,000 people. We know how many people, but what else do we know.

>> SHERI CHANEY JONES: How are we helping them. Absolutely.

>> PAULA McELWEE: No more questions from everybody? Well, I have another one. It's a little one. You used an abbreviation, ROU and then you said return on investment. What does the U stand for.

>> I think that might have been a typo.

>> PAULA McELWEE: Oh, good.

>> SHERI CHANEY JONES: It should be ROI, return on investment. Thank you for calling that out.

>> PAULA McELWEE: I just called it out because I didn't know ‑‑

>> SHERI CHANEY JONES: I saw that, ROU, where did that come from? It should be ROI.

>> PAULA McELWEE: Just a little clarification.

As we're looking for finding this ‑‑ unarguable value about what we do, do you see that as an individual project or a regional project or a statewide project or a national project? What are you kind of thinking about Independent Living and finding that value?

>> So, as we'll go through this presentation, you'll find that I think it's a "yes and." I believe that organizations should know their unique independent value, like what value are they providing the community, but what we did in Ohio, and Jeremy will get into this soon, is that we were able to take the independent uniqueness of each of the Independent Living Centers across the state and look at it, what is common across all of them? So how could they share their data and information and tell an entire statewide story so the state could talk about the state's Independent Living Council value, unarguable value, but then each individual centers are empowered much to their own story of impact. I would think then if we took to that a national level we would do the same approach. Because each state is unique. Each community is unique ‑‑ has unique challenges, and so it's ‑‑ let's all be empowered to talk about our mission and fiscal high performance, but where we're common, share that. Amazing if you could talk about it from a national level, too.

>> PAULA McELWEE: Yes, an exciting thought. Sara asks, I would love to hear your recommendations for a new director on building this culture.

>> SHERI CHANEY JONES: Meaning ‑‑ so I guess what she's asking is ‑‑

>> PAULA McELWEE: Where do we start, I think.

>> SHERI CHANEY JONES: Well, you start by participating in these webinars because we're going to talk about it. We're going to walk through the steps. So share this webinar ‑‑ if you are the new director, you're getting the right training. If your director is not on the webinar, share them with him or her. Also impact and excellence, I don't mean to be self‑promoting, but it has a bunch of great insights in how to create these cultures in your organization as well.

>> PAULA McELWEE: A lot of the tools we're going to need to make this happen.

>> SHERI CHANEY JONES: Yes. I will be walking you through like all the steps you should take.

>> PAULA McELWEE: And remember this is going to be posted on the website on demand, and so after you have worked here through the things that we're going to do, you can share it with other people in your organization so you can begin to build the team that's going to be working on this, make sure everybody got in on it, or if you just want to see it again because you think, well, now I wonder how this applies. I want to go back through and see a little bit. So that's also a real good answer.

>> SHERI CHANEY JONES: Yes. We have the work‑up which I will be talking about at the end which gives you a lot of exercises as well.

>> PAULA McELWEE: Well, we're not seeing any other questions right now. So if you would like to jump into the next slide we're ready to go.

>> SHERI CHANEY JONES: Great. Sometimes when we pause there I get this question. That is, oh, Sheri we would like to create a high performing measurement culture but... I call them the realities. We'll get things we don't have enough money. We don't have enough staff. We don't have enough trained staff. We don't have enough expertise. So the curse of the not enough's, and I honor those things. I understand that those may be your realities, but I also want to challenge you to think about if you're listening to this work, and I'm talking about high performing culture measures and how it can help you increase revenues and impact and you're thinking to yourself that's great for other people, but I don't have X, Y or Z, I just ‑‑ I want to challenge you for a minute. Because the research that we found was that there was no correlation between the size of an organization, their budget and their ability to create these cultures. So it's kind of like no excuses. The only predictor we found was the willingness and commitment of leadership, and if the leaders were committed to doing this work, they were able to do this work, and it doesn't ‑‑ and the steps that I'm going to share with you today are not costly things. They may take some time, but they don't take a lot of resources in terms of at least money and budget to do it. So I just challenge you, then, if you were wrestling with some of those questions, to just know that this doesn't have to take resources. It just takes the willingness and time and commitment to make it a priority, because what it's going to do for you and your organization and what it's going to do for those that you serve. And so if you are curious to know what your measurement culture score is, I invite you to go to impact & excellence.com and ‑‑ so the website is actually impactandexcellence.com. It's listed in your workbook as well. One of the activities is to go and take this assessment and the code is in your workbook. So we'll talk about that activity near the end. But you'll have the opportunity to go take the assessment at no cost, and you'll get your customized report which will share your reports to everybody ‑‑ to our sample results and it will give you ideas about where you might want to get started or where are areas you might want to start focusing to increase your culture.

So as we talk about creating these cultures, know that it's not just about data. We're going to talk a lot about data in these three‑part webinar series, and data is really key, but you also have to kind of recognize that it's about having the right leadership and having this culture of excellence. So it's not data alone is not enough to create a high‑performing culture because data can be scary. A lot of times organizations aren't collecting the data that they need because they're afraid. They're afraid of what it will say. And so we need to be mindful that that's a reality, and we need to make sure that we have the right leadership traits in our organization as we as looking at it as this continuous improvement tool and striving to be better and continuing to innovate and improve and have Inc. why the best culture, the most impact that we possibly can, and when we incorporate our data and our metrics in an environment like that, that's what drives change. That's what makes it successful.

So first we have to change our mindsets before we change our results. So what I want you to do ‑‑ now, I'm not going to make you do this because we're in a webinar, but just imagine we were in an auditorium all sitting together. I would make you repeat after pea, and just say kind in your own heads think about creating a high performing measurement culture is fun, it's easy, it can be done with your own staff, it can be done within your own budget, and it can and will lead to positive organizational outcomes. And so that's the mindset we need to have in these three webinars to really be successful. So once we have the mindset and once we know that, yes, I'm excited about creating these high performing cultures because what it's going to do for my organization, my network, the clients I serve, then we can talk about what are those steps. And so there are five steps that are going to help us create these cultures, and we talked a lot about culture already this afternoon, but then we're going to talk about clarify and how we're going to be about clarifying, capturing, how we can capture the right data, what is the right data to capture, how to communicate that data, and then how to use it to change and celebrate. So we'll be discussing these elements over the next three webinars. But I don't want to talk the whole time. I want to make sure that we contextualize this in a real‑life setting because part of what brought this webinar series here is that we had the honor to work with the Ohio Statewide Independent Living Council and Jeremy Morris, and so he is on the webinar today, too. So we decided we would have a Q&A session with him, some questions we already decided to ask him to help conceptualize this particular content so you can see how it really works in the real‑life setting. And so Jeremy, can you hear us? Are you there?

>> JEREMY MORRIS: I am.

>> SHERI CHANEY JONES: Yay. So, Jeremy, let's dive into Ohio's motivation. So, why did the Ohio Statewide Independent Living Council decide they wanted to create a high performing measurement culture.

>> JEREMY MORRIS: For us there were several factors that really led into this discussion happening. One of them ‑‑ you know, one of the factors that we saw was one of the centers went through this with Sheri beforehand, the ability center in Toledo went through this process, and we started to all see the results that they were having and the data and the outcomes that they were able to really represent that showed the importance of what they were doing and the increased funding that was coming behind it without really changing anything in their structure but just being better able to tell their own story and make decisions off of that.

Another one was a little bit of recommendation I will say from our designated state entity. For years we had worked with them and they always had some heavy criticism of the way Independent Living was operating, that we didn't really measure our own performance, we weren't really tracking anything of good value and being able to show our true value in Ohio. So we really needed to look at the way we did things and we had a lot of conversations about how can we really change our own approach to things, and some of it goes into improving just our own internal practices and business operations. And I think a lot of this always led to the same end, and Paula brought this up a little bit ago, was we heavily relied on that 704 data, which if you ‑‑ I mean, if you're inside of Independent Living, sometimes that data doesn't make sense, let alone if you try and present that exact information to somebody outside of our world. Eye doesn't always make sense. It doesn't always show what you're really doing. And it can be very confusing. So we wanted to be able to take pieces of what we looked at and what we were already doing and try and figure out, how can we really put things together in a better way to represent what we are really doing in our communities, across the state and the impact that we're having.

>> SHERI CHANEY JONES: So in terms of ‑‑ and I know we had this conversation for a while when we first met, when we first started working together. So in terms of moving forward, what barriers or obstacles did you have to overcome and how did you overcome those?

>> JEREMY MORRIS: We're still working on this and moving forward. We are trying to get 13 different organizations to work together. It is a barrier. You know, trying to get everyone on board and everyone participating can sometimes be a challenge, but we're really trying to be as thoughtful as we can through this so that we are getting input, we are getting some feedback as we go. One of the key things we learned very quickly is there's a lot of inconsistency in how we measure things even just with the reporting that we have to do now. Centers were recording things in different ways and it's leading us to ‑‑ some of this has really led to we had to take a couple steps back from where we even thought we were in order for us to move forward. So we're working on a lot of those things now, trying to help figure out better ways to ensure there's some greater consistency going on across the network and really building in the input from everyone. We have a lot of hopes that this is going to ‑‑ as October 1st is when we're really going to start reviewing the data that's coming in and starting to work with it a lot more. We went through this past year a database conversion that all of the centers decided to switch to the same database. So that created an obstacle and a barrier itself of going through that process, because in that conversion that's when we really found out how differently everybody was recording and reporting everything but it's given ocelot to look forward as we move forward. While a lot of it has been barriers and obstacles, it's been a way for us to really see our own deficiencies as we operate and if we want to try and come together more collectively and show a statewide impact where we need to start from.

>> SHERI CHANEY JONES: Great. Anything else you want ‑‑ I know you have a couple more questions for you after a couple more slides but anything you want to add on this section in just getting to the decision to move forward and create a statewide framework?

>> JEREMY MORRIS: No ‑‑ I mean, as we did that, it was ‑‑ we really put this together and had one of the statewide ‑‑ the CIL association conference calls that they do. Sheri presented to them and talked to them about this process, and we really made sure that it was something that the network wanted to buy into, because we knew from the beginning if we didn't have a decent buy‑in from everyone this was never going to work. From a statewide level it was never going to happen if we couldn't get some level of buy‑in from everyone. And I think that because we had seen so much criticism of how we reported things and what information we had available everyone could see the possible ‑‑ the future of what this could hold for us, that if we're able to give a better picture of what Independent Living is about, how much more powerful we could be as we move forward and we hope that that's going to be the case.

>> SHERI CHANEY JONES: Yes, me, too. I think it will be, though. I think it will. Great. Well, we'll hear from you again in a minute but thank you for sharing those insights. So it gives the listeners, the audience, to get a sense what was motivating Ohio to want to consider this.

So I'm going to make Jeremy blush here in a minute because I talked about how it really comes down to leadership. We talk about creating a data driven culture. And with Jeremy's leadership and the other councilmembers coming on board and getting the buy‑in for this process, you know, they said, yes, we want to create a data‑driven culture. We want to have the information to talk about our impact. And so as I mentioned, the elements of a data driven culture are more than just having data. It's about how you're going to use it. What are you going to strategically pleasure? How are you going to use it? Working and wrestling through those definitions. And so as you ‑‑ I'm hoping you're all starting to think about how do I bring this to my organization or my statewide network, here are some things you want to consider, especially if you are going to be the champion. If you are going to be the champion of this in your state or organization, there are some things we've learned, is that great organizations that have these high performing cultures have great leaders. This is a framework I put together. It's actually the content of my second book, but that's not yet published. So here's some information that you can't find anywhere else in terms of what do those high performing leaders look like. And they are ‑‑ first and foremost, they're willing to be a pioneer. They are willing to go places maybe your organization or network hasn't gone before. So if you think about Jeremy's story and Ohio's story, they were willing to say, let's try this. Can we all agree on certain data elements, can we will agree on where to share and work together to share our data to tell our story better at the statewide level.

So someone who is willing to be the pioneer and say let's go somewhere we've never gone before. Then the key thick is to partner. You have to be willing to partner and understand how you're stronger together, whether it's within your own Independent Living network in your state or it's with other sister agencies to move the needle forward or to move some collective impact agreement. But we find great organizations have that desire to partner because they understand how those partnerships can advance their organization as well as the lives of those that they serve. They're also willing to come in and make a plan. Because part of having a measurement culture is creating a measurement plan and a framework that will help you guide ‑‑ guide your organization. Then once you have that data, one you start to collect the data, they're willing to pivot. Because it's possible once you start to collect data you realize, wow, this isn't working the way that we want. Talked about the court system that found out they were making children worse. They could continue to make kids worse but they didn't. They pivoted. They took that information and ideas and move different. Also you have to be able to prove your impact. That's what it's about. You have a hypothesis what your services do. So you're proving your hypothesis. The most important thing and the reason in this graphic it's in the center, the big plaque "persist," is because it's going to be bumpy. It's not like Ohio just said, let's do this, and there was never any hiccups. And there will continue to be hiccups, but it's persisting, and it's learning, and it's growing and it's moving forward. Just know if you want to be the champion of this in your organization or network that these are some of the things that as a leader you're going to be ‑‑ you're going ‑‑ we also found organizational structures matter. So one of the things that matters is training, is to let people know what a measurement culture is. And so this is great. We have these webinars available on demand. You can have anyone in your organization have access to information and get them thinking about why this might be important to their organization. Because this might be new to them. Also upper management communication will be key and critical for this process. Because when we start to measure things, people get fearful, and they're afraid, especially if it's new for your organization. They might worry about are you going to use this to punish me? Are you going to use this to eliminate my job or my program? So it's really important that you continue to communicate why you are doing this, why it's important, how the data is going to be used. Also then once you have the measurement framework in place, you can be more autonomous. People ‑‑ and they want autonomy. As an employee, employees want autonomy. They want to be able to be creative and try new things and shine, and so having a measurement framework allows you to do that. In addition, you need to have feedback. So, again, this constant communication, using the data, getting feedback from your stakeholders from your staff, from your communities from your funders, from your partners and using that regularly will help reinforce a data‑driven culture. And then using that information for innovation. And so if you look at your current organization and you think, wow, we have all those things, then dropping what we're teaching into your organization, it will soar. It will grow. It's like the soil that will allow a measurement culture to flourish. I talk about my aging story earlier, Department of Aging story, and the reason it was able to be so successful was because the director had already created these systems and definitely was a high performing leader and valued the things I talked about in my previous slide. So creating the framework and the metrics to tell her story was a natural fit because of the organizational culture. So I just share these two elements with you because I know in ‑‑ through the decades of research, I know if an organization isn't working on itself at the same time it's creating a framework, it won't have as great of success as if it doesn't. So that's just some things to keep in mind. And then I'm going to go back to Jeremy, because ‑‑ he's wonderful. We're going to talk a little bit about what structures were in place already that helped them be successful in getting up this and running. So are you there, Jeremy?

>> JEREMY MORRIS: Yes. When I talk about what structures we had in place, it was a lot of figuring out what we didn't have in place, and I think that that's really what has helped us push forward on this, because we didn't have a lot of good valuable information in place, and a majority of our networks saw that that was a major problem for us. We were overlooked regularly by other state partners. We weren't taken as seriously in a lot of aspects because we didn't have anything that helped us show why we should be there. And especially in working with our designated state entity. We needed to have a better way to show them that we should have some value to you guys and there's a lot that we can do to work with you. So us going through that process, you know, taking that internal look of where we were, actually really helped us to move forward on this. We did have the centers wanting to see some consistency. They wanted to have some level of similar data going on across the network. So that was part of the reason why we went through the database overhaul and everyone switched to the same system, and one thing that we did have the benefit, because the DSE had been really pushing that consistency, years ago they had increased some of the funds to the SILC so that we could help ‑‑ we pay for the licensing of the SILC databases. So that is something that in terms of our own infrastructure we had that going for us that we had the ability to help the CILs in going through this because we were helping pay for their database licensing. Having those pieces already in place did help. Going through the switch we were able to really look at what we want to have in place, and I think that going through this, the centers really wanted to work together. They wanted to see ‑‑ they wanted to see results across the state versus just here's what we are doing in our own individual center.

>> SHERI CHANEY JONES: Great. And so I kind of presented some of the elements of a data driven culture, and I thought Ohio ‑‑ it would be fairly easy for me to work with, and my team, to work with you. But what elements of creating a data driven culture besides aligning the databases? Were there any other elements you had to work on over the past year and how did you go about doing that?

>> JEREMY MORRIS: One thing that we are in the process of finalizing is a standardized list of information referral topics that every center will end up using so that that way when we're looking at what areas are people calling into the center about, we'll be able to pull consistent data from across the show ‑‑ if it's 35% of people that are calling in are calling about housing concerns, it helps us show that there's needs in housing, there's problem goings‑on, especially if we're going into an advocacy project, we're going to have data behind that shows here's some of the needs that are happening. We had started come of that work a couple of years ago of looking at standardizing processes and we ended up falling short because we didn't ‑‑ we didn't have the final buy‑in. We never really took it to the next level. And some centers implemented certain things and others didn't. So we had been looking at data for a while but we didn't have a way of how we were using it other than let's try and create some consistency. Most of this we're still ‑‑ we're still working on. We have some pretty good things that are starting but we're already trying to plan for the first couple months that we're going to be looking at this data, I've asked each of the centers to nominate a person from their center who works with data or working at the consumer level that we can have involved in some of these conversations so that when we start figuring out, are these measures working, are we getting the type of results that we're expecting to see, or do we really need to take a couple more steps back to fix some problems. We want to make sure we have the people in that understand what's happening on the ground level, and I think that's going to be something that we have that buy‑in from the centers who are willing to see this process through.

>> SHERI CHANEY JONES: That's great. That's great. I'm going to see if Paula can come back in here now because I think there might be other questions for Jeremy. So we can open up questions for me and for Jeremy at this time. We can't hear you. You're muted.

>> PAULA McELWEE: I clicked but it didn't click. Yeah, Jeremy, I think there are several ‑‑ you can see the Q&A list ‑‑ that are directly related to the council operation and the CILs and that relationship. So one of them is what types of resistance did you experience from either your council or your CILs or both? What did you see in that specific situation? Kim asked that, and Brook asked something very closely related. I would love to hear recommendations for getting your CIL buy‑in. How do you get people to the bridge when often they aren't even on the same path.

>> JEREMY MORRIS: I think that's one thing, because ‑‑ when we stopped looking at the infighting within the network to some extent of who is getting what amount of money and it was really about, okay, everyone is very underfunded. Let's all admit none of us have the resources we really need to do best job we can in our communities. I think that that was part of us getting the buy‑in, because the centers two years ago had tried to, as part of the budget process, when we were defending the $250,000 line item that was in there helped bring in the matching funds for the Part B and the I&E funds for the SILC, there was a time when I think it was 50,000 of that was being cut. So we had to go and show that, look, there's a reason that we need is little bit of money you're keeping in the state budget. We would like some more, but I would say we weren't taken seriously to some extent because we didn't have anything are to really show. So we started looking at this could be the opportunity that if we're able to better show what we're doing and better look at ourselves, can we potentially grow our network? And that is something ‑‑ it's finding those common threads that once we got everyone to admit, yes, we would all like a little bit more funding, we would all like to have a better selection of resources for us, and we would like to have either about our impact in our community, that's how we were able to start these conversations.

In terms of resistance, a lot of the resistance we did get I think was more hesitation. Some people weren't sure if we would be able to achieve going through this. It was a scary thought to go through a can we really pull this off and make this work, and that's part of the reason why ‑‑ we're not moving very quickly on this. I think that that's actually going to end up being a benefit to us because we're not ‑‑ we're not forcing this to happen tomorrow. That we want to make sure that as we go through the process it's well thought out.

>> PAULA McELWEE: That makes sense. One of the comments that Brook made was that the that you talked about a little bit was probably not only fear of measuring things but fear of the additional reporting requirements, and I was really struck, Sheri, by what you said when you said you already have the capacity. Start with that assumption, that you already have the capacity to do this, both financially and with the resources of who is doing the work, and it's so true. We are doing some things right now. So can we fine tune and focus and make this the focus.

Any resistance from the council itself, Jeremy?

>> JEREMY MORRIS: Somewhat just because they had ‑‑ when the council started to fund all of the database licensing, it was done at the time years ago under the assumption that things would be done in a uniform way. So the council itself was a little concerned that are we just going through something again, and is this going to be using resources for something that's not going to amount to anything?

>> PAULA McELWEE: Right.

>> JEREMY MORRIS: I think that that was one of their biggest concerns. And having every center participate in the development of this, I think, helped show that there is a commitment going on. And to talk about what you just said about having the data already, when we look at some of what we're measuring under looking at how well we've done, some of the things that we're tracking are the successful ‑‑ percentage of successful outcomes. So how many goals have been achieved versus how many goals are in progress? Also something the centers are already reporting on but it's coming up with an actual percentage and a ratio of it. We want to look at the percentage of consumers achieving at least one goal. So somebody may not achieve every goal they're working on, but how many are at least making that progress. The average time to complete their goals. I think that ‑‑ as we look at it, making sure people have the understanding that there's some long‑term things they're working on with individuals. Some of these changes don't happen overnight and they could take a long time. And also looking at the average goals a consumer sets. So how many ‑‑ on average how many goals is a new consumer setting when working with a center? Because it's going to help show the real need for us, that if on average consumers are setting five goals when they first come to the center, there's a high demand for what we're needing to do.

>> PAULA McELWEE: Right.

How are you using this measurement culture related to your SPIL, to your plan? Is there a connection between the goals and the SPIL? Are you using it in any way to monitor and evaluate the progress on the SPIL?

>> That is the ‑‑ that's one of the end goals. Righted now we have in our state plan to ‑‑ to help increase the efficiency and effectiveness of IL services, and that's where we ‑‑ you know, a lot of this work has fallen so far under that goal. We're hoping in the future we're going to be able to look at some of the data and the information that comes out of this to help us decide what areas do we need to work on, what areas is there a lot of consumer need that we can really pull from this and hopefully see improvements down the road. So it's something that we want to build in pieces of this into future state plans. We're not going to ‑‑ we're probably not going to incorporate everything into our state plan because we think that will be a little too limiting to us, but we want to make sure that there is some connection, but they are somewhat side by side.

>> PAULA McELWEE: Makes sense. Kim asks: What's your vision for the process and do your stakeholders share the vision?

>> JEREMY MORRIS: If you mean stakeholders as in the centers and the council, I would say yes. We really want to be able to show a true value of Independent Living in Ohio. We think that we're one of the most underutilized components in the state and we would eventually like to change that, and with that hopefully see increased opportunities for the centers, whether it's funding or just additional projects that can be going on within the communities. We're hoping that we can use this information to help grow the true impact of Independent Living.

>> PAULA McELWEE: Excellent. I think that's all the questions, Sheri.

>> SHERI CHANEY JONES: Great. Thank you. And thanks, Jeremy, for than insight. I really enjoy how you can ‑‑ you put it to life ‑‑ you put this content to life and give it a real‑Lyle context. So I appreciate your insights and your honesty. So what I want to do is just talk about where ‑‑ what we have already talked about in this webinar and where we're going for the next webinar. So in your emails and when you registered for this and online you will not only see the slides but you'll also see this high performance measurement framework within our series workbook, and this webinar is meant to be action oriented, and that's why we have broken it up into three phases and given you some time to do some homework. In the middle of it. But ‑‑ so the workbook itself has the activities for the entire whole three‑part webinar series, but I would recommend that you don't work ahead because you won't really understand why you're doing what you're doing. So from now until our next webinar I invite you to do the first three activities in your workbook. So the first activity we talked a little bit about it, but do this with your network or do this with your team. And it's planning for uncertainty. So to really understand what's going on in your environment that will create your future. And start to conceptualize at least without any measures, but conceptually what is your organizations unarguable value. What would happen if you went away? Would anyone know or care? This exercise is for you to start to think about why you might want to create a measurement framework like Jeremy talked about in Ohio. They were kind of getting some feedback that you're not really doing a great job telling your stories. You're underutilize. It will help you start to think about why this might help you.

The second is the invite to take the measurement culture survey. You will see in your workbook for instructions to the website to take the survey as well as the code that will allow you to take the survey at no cost. So if you go to impactandexcellence.com and take the survey and you see that it's charging for the survey, do not pay money for the survey. Go back to your workbook and find the code there and put that code in and you will not have to pay. But once you take it, then you'll get immediately a report that shows your responses to everybody else in our sample in impact and excellence. And there is a series of questions for you to go through and ask yourself about your scores and where you can improve.

Then the third action item is the activity 3 which is the leadership and culture assessment, and, again, this is something just to be reflective, to think about the different leadership competencies and the different organizational structures and where is your current CIL or your current council in these things and if there is room for improvement around those as well. These are fun team‑building activities. So everybody ‑‑ the code is for everyone. So, like, 10 people can take the survey with the same code. You'll each get your own individual report but you can then share your results. That's always very interesting. Why did you say we were a 2 and I said we were a 5? Have those conversations and dialogues. Tell help you start to think about this. Those are my challenges for you between now and the next webinar. Do those three exercises. And then next time we get back together we're going to talk more about clarifying your impact and capturing your data, and we're going to talk more about what Ohio did and we'll talk about their logic model and their actual measurement framework and what they're striving to measure and get into more of the real details and nitty‑gritty. That's my content for today. I'll turn it back over to you, Paula.

>> PAULA McELWEE: Thank you. Any final questions? We have just a minute or two if anybody has a final question you would like to share. While you are thinking about that, do remember that as soon as this webinar is over you will see a short evaluation form. It will pop occupy your screen. And we do appreciate having your feedback for that. If it doesn't pop up or if you're on the phone and want to go back and look at the link, you can click on the link in the presentation or copy and paste it and you will be able to give us your feedback. We hope that you will. We will take it seriously. Any questions?

>> JEREMY MORRIS: I will add while everyone is possibly coming up with questions in had trying to start these types of conversations within the network I think one of the most impactful things that as we went through this process was Sheri asking that question of what happens if you go away tomorrow? I think it really ‑‑ it makes you reflect on your true purpose in your community, and it could be a way to really start this conversation with the centers and everyone in your network of asking everyone that question. What happens if we go away tomorrow? Where do people turn? What happens to the advocacy efforts? And help use that to build the story of why you need to have a better picture of what you're doing.

>> PAULA McELWEE: Yeah, that's good.

Anybody else? Going once.

Well, then I think that's it. Thank you so much, Sheri and Jeremy, for giving us a lot to think about and to work on, and we'll look forward to seeing everybody back for the next episode of this coming up in August. So we'll see you all then. Thank you, everybody.