High‑Performance Measurement Framework Webinar Series ‑ Part 2

Presented by Sheri Chaney Jones and Jeremy Morris

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>> CAROL EUBANKS: Good afternoon and welcome to today's webinar, the second in our high performance measurement framework webinar series, how to select and capture the best measures to quantify your impact and value. I'm Carol Eubanks with ILRU. Today's presentation is brought to you by the IL-NET training and technical assistance project for CILs and SILCs. The IL‑NET is operated through a partnership among Independent Living Research Utilization, National Council on Independent Living, Association of Programs for Rural Independent Living, and Utah State University Center for Persons with Disabilities, with support provided by the Administration for Community Living at the U.S. Department of Health and Human Services. This webinar is being recorded and will be available on demand within a few days. You can go to ILRU.org where you will find all of the materials for the presentation, including the PowerPoint, audio, transcript and any other supplemental materials that may be posted subsequent to this presentation. Today you'll have an opportunity to ask questions during the webinar. If you move your cursor on the screen you should be able to see a bar at the bottom and there in the middle one of the options is Q&A and you can use that to type questions at any time and we will address them during our Q&A breaks. If you have a comment that is not a question, you are welcome to use the chat feature. Captioning will also be available by opening the CC tab on the main screen. Please know with captioning you can change the size of it. If you are only seeing one line of captioning you can put your cursor over it and you can see an arrow and click that arrow to make the captioning larger and GIS play seven or eight lines of text once you do that. If you prefer you can view the full screen captioning. You are welcome to log into the chat there and enter your questions and we will respond to them during our Q&A breaks as well. You can find the URL in the chat on the main webinar screen. And one final bit of housekeeping. At the end of the webinar an evaluation form will open in your web browser. Please do fill that out. It's short, it's easy to complete. We use them to improve the work that we do in the future. And I would now like to introduce our presenter for today, Sheri Chaney Jones. Sheri is president of Measurement Resources Company. For over 19 years Sheri 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 measurement resources company in 2010, Sheri's work as a performance center manager with the Ohio department of aging saved the state of Ohio $250 million in annual Medicaid costs with the creation of the long‑term care savings calculator. Sheri is the author of impact and excellence, data driven strategies for aligning mission, culture and performance in nonprofit and government organizations published by JOSE bass in 2014. At the public ‑‑ sorry ‑‑ at the Ohio State University, Sheri taught a course on creating measurement cultures s as part of the certified public managers program. Sheri earned and MA in industrial and organizational psychology from central Michigan university and a BS with distinction in psychology from the Ohio State University. I would also like to introduce Jeremy Morris, who is Executive Director of the Ohio CIL 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 am going to turn it over to you, Sheri, and welcome.

>> SHERI CHANEY JONES: Thank you, Carol. Welcome. Hello, everyone. It's so nice to be back with you again. I know the past hopefully many of you have had the chance to be with us live on the first webinar or in the recordings, but just to sum up what we're going to be talking about across the three webinar series is we're going to begin talking about how to create a high performing culture which we discussed and focused more on in webinar 1. And the importance of creating a statewide Independent Living module for success and I will share what that means and give you an example and we'll talk to Jeremy around how they have used that in the state of Ohio. Then also we'll be talking about once you have this, how do you use this information to attract funders with your data. Then we'll also be talking about how to create the perfect customized statewide measurement framework and we will explain more about what that is today and giving you impactful data driven communication strategies to use data and we will be focusing on that more next week. So to review, and if you have not been able to catch the first webinar, I highly encourage you to go back and review that and watch that because it does set the frame for this webinar and then the third webinar. But there are five strategies that organizations need to use in order to capture the right data, share it in a way that it generates more revenue for their organization and more impact. So the first area is creating a high performing culture, and we spoke about that in webinar 1. Also organizations need to get really clear on what their mission is and then they will capture the data, and we'll talk about those two areas today, and then in our third webinar we will be discussing great communication strategies and how to use that for continuous improvement and quality. So to get right into it in terms of clarify your vision, what we measure matters. You may have heard that expression before. It is really important to have metrics or have measures because when we have those things we will follow them, or your staff will do things in align with that. I like to say what is ‑‑ what we focus on grows. So where we put our attention is where we then have results in that area, and there's tons of research that shows that when we have a metric and people know we're going to organize around that metric [ INAUDIBLE ] we'll see more of that. But with that principle, with that what we focus on grows, means that there's also a lot of power in that, because if we're measuring the wrong things, then our focus and our attention and our energies and our efforts are also going to go towards the wrong things. So before we start collecting any data or developing any measures, it's really important that we clarify our mission. Let me give you an example of what not to do or how when we have the wrong measures we can actually be going in the wrong direction. So a client came to me once and said, I need you to fix our overtime policy. It was a 24/7 facility, so they had to have staff to patient ratio at all times and they were convinced that their overtime policy was broken because a lot of staff were being forced to work mandatory overtime and it just was really broken and they believed it was creating a lot of morale issues within the organization. So managing the overtime and morale are not inherently bad things, but ‑‑ so when they came to me and said we need you to fix the overtime policy, I said, absolutely. I am extremely happy to take a look at the overtime policy. However, I also think there might be some other metrics we may be want to be organizing around. And so in addition to their overtime policy, I looked at things like recidivism, client recidivism. I also looked at staff safety. I looked at patient satisfaction, or resident satisfaction and a host of organizational metrics around perceptions of the overtime policy that I was to study.

What we found was that actually the overtime policy wasn't broken. What was broken is that managers had kept open 20 vacancies, and the reason they did this is when someone left they weren't hiring a new staff to replace the person who left because the top upper management, the only metric that the supervisors felt that mattered to this organization, was overtime. That's all they ever talked about. That's all they ever measured. That's all they ever really were drilling into leadership to focus on. And so because of that, leaders, supervisors, were making decisions aligned to that metric, which was overtime. But because they were doing that, as a result, they had increased recidivism, they had increased incidents and reduced staff safety and extremely horrible staff morale.

So what we did is we worked with them to refocus the measures that they should be collecting into a variety of metrics, including ‑‑ although overtime still remained a metric but first we said you have to fill your vacancies, one, and now we're going to implement a variety of measures so you're not just managing the overtime. So they started to manage perceptions of staff safety, recidivism, incidents, and within 18 months they saw their perceptions of staff safety go from only 10% feeling safe to 75% feeling safe. Their recidivism rates for their patients dropped significantly because they started to focus on the things that mattered to drive results. So I give you that example of what not to do, because the power data can have, and especially if we put all our attention and energy in the wrong metric.

So how are we going to make sure we are set up for success? So the very first exercise that is ‑‑ I'm taking all the jargon out of creating a measurement framework. The first exercise that is so powerful is this why why's tool. So how this tool works is that if at first you ask yourself five times, I call it the five‑year‑old test, five times, why do you do what you do? So if you think about an Independent Living center, why do you do ‑‑ why do you do what you do? So individuals have access to information and referral. Well, why is that important to our communities? Well, because we want inclusive societies. And why is it important that we have inclusive societies? Because everybody has value and everyone is entitled to a happy and independent life. And why is that important to society? Because when we all have access and equal opportunity ‑‑ I just did that logic chain for you as an example. Hopefully your own words and how you would say it would be much more eloquent, more descriptive and really be focused into the work you do and why you do it. So first you ask yourself why do you do what you're doing, and you have to ask it five times because you can see as I generated those five layers there's a lot of things going on there. It's not just one thing or another.

Then ask yourself those same set of questions but from a different lens. Why do your funders and partners want to partner with you? And when you do this particular exercise and answer the stream of questions, what you might notice is that your funders and partners don't necessarily have the same motivations and why's as you do as an organization. So, for example, maybe a state government is funding some of your programs because they want to keep individuals out of higher cost Medicaid funded nursing homes, for example. So really understanding what is the motivation of your funders and partners is key to make sure that you have the right metrics in place, and then the third series of questions, why do your participants and consumers participate, what do they hope to accomplish? Because, again, their answers are going to be slightly different than your answers. So absolutely a participant may come to your program because they want to have a more independent ‑‑ more independence in their life or have more inclusive opportunities, employment opportunities, but let's be real. It's not a negative anything on our own patients or own clients but our consumers, but it's around they're really focused on their own problems and their own needs and how do I get those solved. And so when we think about our measures and why this is so important, first it creates a framework for what really matters to us in our organization, what matters to our funders, what matters to us, and what matters to our participants. So when we have this clarity around our whys, then we can start to figure out what is the right things to measure.

So here is an example of a how the five why's exercise can completely transform the way your organization thinks about what it does and its work, and especially if we take this to the statewide level, how all Independent Living Centers across a state can start to at least get on the same page about why a SILC exists.

So here is an example. Before doing the 5 why's exercise a public agency had ‑‑ a statewide agency, and this is not O SILC just to be clear ‑‑ a very boring mission statement. No one really knew what it was. It was very technical. It wasn't inspiring. And so why this slide, if you can see the slide that says, we are a public agency that blah, blah, blah through blah, blah, blah aims to improve blah, blah, blah for Ohio's blah blah blah. There were clearly words. But it was boring. It wasn't capturing or engaging anyone's interest. After doing the five whys, they were able to say, our mission, our purpose is to promote choice, independence and quality of life for all aging Ohioans. This game kind of their guiding lens. So when we start to think about measurement framework, well, if we say we're about promoting chase, independence and quality of life, versus population, what do we need to measure? We need to have measures of choice. We need to have measures of independence, of quality of life. So doing our 5 whys exercise really homes and narrows in on what should be most metrics for success. Also another benefit of having this really clear, defined what we're about, what we're trying to accomplish, is that this broke down barriers and silos across many different entities, because before in this particular organization people were thinking, well, I get funded by Medicaid, and this other organization ‑‑ I get general revenue funds. This other division within this organization would think, I get older American act dollars. So they were thinking more about the grants they received or the funding bodies that they received instead of thinking about collectively that organization existed to promote choice, independence and quality of life. Those funding mechanisms, those are just vehicles to deliver great service to achieve these goals, but at the end of the day, it didn't matter what kept you sat in, what funding streams you received, what those requirements were for the funding streams. What mattered is they were all working collectively to achieve these goals and allowed the organization, and we're going to talk about this in a minute, but to create a measurement framework that aligned up across these different funding streams, across these different purposes, to demonstrate how the organization achieved these goals.

So when you do go to ‑‑ I know you can't read this slide if it's on your computer, and don't expect anyone to be able to read this particular slide. So I'm saying refer to your workbook pages 5 and 6. So in the first step we need to do in creating a measurement framework is first to create an organization‑wide logic model, or in this case we're talking about creating a statewide Independent Living center logic model. And so really looking at across all of the various work that's done at your state level can you drill that down into what do you do, what do you have to help you do the work, what do you do with those resources, then what are your short, medium and long‑term outcomes. So essentially is a logic model is one piece of paper that communicates what your SILC is about. And so this is OSILC's logic model. You can see their mission is their target population is there at the top and then they list everything ‑‑ all the inputs, all the things across the state that they have to do their work, their human capital, their policies and plans and their funding. So it helps them get really clear on what's available to them to deliver their work.

Then we looked at their activities and their outputs. So what do they do with this work? And how do they ‑‑ how are the buckets ‑‑ obviously there is there's a lot of independent and individual tasks around these core services and community based services, but this is what the group agreed that across all of our organizations at the state we're doing these types of services. And then we get into the short, medium and long‑term outcomes which are what are those why's ‑‑ they're really those whys. If you go back to the five why's exercise, short, medium and long‑term outcomes are your whys. So here is an example. Often we get really hung up in what is an output and what is an outcome. So what is an activity and account of activity versus what is an outcome. Hopefully you are around your chat because here is a quick chat question to interact and just put in your answer here. But if you are looking at this slide, and if you can't see the slide, I'll explain to you the scenario here. So McDonald's sells 33 million hamburgers a day. And Five Guys hamburgers, hopefully you have heard of them, they sell 350,000 hamburgers a day. So if you have had the opportunity to experience these two burger chains, I want you to in the chat really quick answer this question: Who makes the better hamburger? All right. Go.

All right. So I am seeing a lot of Five Guys. All right. So I've got no McDonald's here yet. So my question to you, if we were face to face live would be why? And I would typically get answers when I do this presentations live, answers such as, well, the taste. Five guys tastes better. The ingredients are fresher. It's better quality. And so what they're doing is rating the hamburger based on things that have nothing to do with the quantity of the number of hamburgers. So what I say to get us out of our nonprofit social service world and get us into thinking about outcomes is we need to stop counting hamburgers, meaning that we need to go beyond just the number of people we serve, the number of training classes we held, the number of I and R calls we had. Those are all really important metrics, but they don't talk about how well and who is better off because of your work. He and so the outcomes really moves to the quality piece, to that what are the things that people experienced because of your work?

Here's my definition. This is Sheri Chaney Jones's definition and since it's published in the slides I can now be the authority on it. When you think about is this particular why or outcome, does it fall in the short‑term bucket, the intermediate bucket or long‑term bucket, here is how I see these three categories. So the short‑term bucket I see as the things that happen immediately after contact with a client. So if it's an Information and Referral call ‑‑ if that's the intervention, if you will, if that's the activity, then the outcome might be increased access to needed services. You know, very, very simple. The short‑term outcome is what happens immediately after that 30‑minute ‑‑ or 30‑second or minute and a half call. It is not about time. It's about what happens immediately. So if you have another program that's an employment program and it lasts six months or nine months, that short‑term outcome is what happens immediately after that program ends. So it's not about time, per se. It's just about intervention and impact of that intervention.

Then in medium‑term outcome is the social change that occurs when the individual goes out into the world and applies that particular new short‑term outcome. So if I have a new connection or access to a resource I didn't have because of my information and referral call, then now because I take action on that I now am connected to better healthcare or my home has been repaired or, you know, whatever it is that ‑‑ it's a change in behavior. And as an organization you should expect your short‑term outcomes. You can control those. The results for those should be really high, in the high 90 percents. You're hitting those all the time because you have direct influence over how you deliver your programs and what the short‑term outcomes should be. Enter medium term outcomes are a little bit harder to control always because we're talking about people, and people have free will and there's different factors that may impact whether they're successful or not and you want to know this because you want to continue to be tweaking your interventions and your programs to make sure you are addressing whatever barriers are going to exist when your clients, consumers go out into the world and try to apply this new information or skill or knowledge they received.

Then lastly the long‑term outcomes is what happens when across a lot of people. So you serve a lot of people over a lot of time and what happens to the community? So if all the people you serve experience a short‑term outcome and then this intermediate outcome, how is our world different? Are we more inclusive? Are we more ‑‑ you know, are we thriving? Really, what does that society look like when we do that?

And so to kind of contextualize the logic model, I have a few questions for Jeremy Morris, because what we did with O SILC is we worked with them through our creating a high performing measurement culture and as I mentioned, the first step is to create a logic model. So we worked with them to create the statewide logic model and I want to ask Jeremy some open‑ended questions and give him time and give you time to ask him and I questions about the logic model process.

So, Jeremy, if you could just share with everyone how did that process or does having a logic model help the O SILC in terms of clarifying your activities and how to tell your story and other things before we put any metrics to this process.

>> JEREMY MORRIS: Hi, everyone. This process of developing the logic model actually turned out to be kind of a nice team‑building exercise for our network because we really had to work and separate the inputs and the outputs and really look at the fact that some of the things we were counting as outputs, they're not the outcomes that we needed to be looking for. So it was having that network‑wide discussion and figuring out, you know, even just looking at the inputs, what resources do we have that we're working with? What factors do we need to be considering? And then when we got to some of the activities, trying to break that down. And we originally had a massive list of activities and outputs, and it was having that conversation of how do we frame this in a way that if somebody else looked at it it would make sense. So we initially had ‑‑ I mean, any service that a center was doing, even if they were the only ones doing it, we had those listed out on the activities. So then we were able to break them down and we really ‑‑ we ended up making the decision that breaking it down into core services and the community‑based services actually made a lot of sense. So we defaulted a little bit to what some of the federal reporting was. But it was going through this process and actually having these conversations with the entire network made a difference to make sure that we were all looking towards the same goals because we have never really taken that time to say, look, you know, we know that we're all here for the same reason, and here's some of the nuts and bolts that go on behind that.

>> SHERI CHANEY JONES: Thank you for clarifying how those ‑‑ it wasn't originally we just went straight to the way the federal reporting went. It was taking all of those activities across all the different centers and then making the decision that they do all align under this, and so that's a really good point that the outcome of the logic model doesn't really reflect the great conversation that went on to getting there from going with all the detail back to we really do think that they all do fall into these different categories. So that's a great call‑out.

Anything else that ‑‑ have you been using it? Do you use it? Or is it just that was a good process to get on the same page and it helped with the measurement framework?

>> JEREMY MORRIS: It was a very good process and it did help with the framework, but it also helped us with our own messaging a little bit, because even looking at some of the short‑term outcomes, it gave us a little bit better way to talk about the work of Independent Living. So talking, for those of you who weren't able to see on the screen, the first one under short‑term outcomes was increased community awareness of equity and inclusion. You know, that's something that's we may talk about the specific activities that we're doing, but that's one of those short‑term outcomes that we really ‑‑ we really do focus on and a lot of people ‑‑ that message gives a lot more presence to what Independent Living is doing within our state instead of just talking about we are doing aggressive outreach to rural communities.

>> SHERI CHANEY JONES: Yeah, that's a great point. And it's also ‑‑ I am a logic model lover for many reasons. One, it becomes a universe of what you could measure. You could measure everything on that logic model. Don't. We'll talk about how to whittle the measures down. But it also gives everyone a framework to then have consistent language across all the different organizations or even within departments within a center as they can take off what doesn't really apply to their particular work but use the same language across in terms of what those outcomes are they're trying to achieve. So if your particular program doesn't achieve that outcome, once you have a statewide framework you can kind of whittle down what applies to you, but then the language is similar across the whole network. So it really helps with that communication clarity as well.

So I would love to open up, take this time to stop, if you have questions for Jeremy around the logic model process or why certain outcomes were picked or not picked, or me around why you would do a logic model, we would love to hear them now.

>> CAROL EUBANKS: Sheri, we do have one question that says, how do you measure the social change that you describe in terms of applying intermediate‑term outcomes?

>> SHERI CHANEY JONES: That is a great question. We're going to talk about that in the second half of this training.

>> CAROL EUBANKS: Okay.

If anybody has any other questions, please submit them in the Q&A tab.

>> SHERI CHANEY JONES: I know while other people might be thinking of questions, just an aside, before ‑‑ you know, years and years ago, when I was getting into this field, I realized appear lot of people had been experiencing a lot of really horrific logic model experiences and logic model trainings. So if that's been you, on behalf of our whole entire field, I apologize. And that's why I start with the five why's exercise. Always start with the five whys exercise, because that's an easy ‑‑ that's easier to answer. Oh, why do we do what we do? I node why we're doing this work. I know what we hope to achieve and what's important. Once you do those five why's basically the language that becomes your short and medium and long‑term outcomes. And so that's why the logic ‑‑ or the five why's exercise should feed into your logic model creation because it's a lot easier to answer those questions than if someone forces you to go, what is your short term outcome, what is your medium‑term outcome.

>> CAROL EUBANKS: There is another one that has come in and again, I don't know if it will be later or not, but it says: Can you give any examples of measuring changes in attitudes. I know it can be hard to zero in on, but please offer any if you have some.

>> Sure, I do. I'm going to go into that. Let's do that.

This is just a funny slide to capture your results. We went from to once you get ‑‑ once you have conceptually defined what the outcomes that you want to achieve, now we can start to say, so, how will we measure? But not until we define it can we figure out how to measure it. So we're going to talk all about the how now. I love this slide because this ‑‑ it's a cartoon. It's a Dilbert cartoon and there is MBA guy that says I put this spreadsheet together that might interest you. The boss is saying, it's so boring it hurts my head. And my brain is trying to escape through my ear. The MBA sheepishly says, I get that a lot. I can resonated with this. When I was right out of the graduate school and knew how to do some cool statistics and knew a lot about data and data analysis, I did a study ‑‑ I was a performance center manager for the domestic and juvenile courts, and I had this amazing study that really predicted what youth would come back into the system and which ones would be fine and different factors that correlated with success. And so I was so excited because I thought this data can totally revolutionize how we deliver service. I mean, it will totally change our effectiveness and our impact and I'm super excited. And I prepared this really long report and I gave it to him, and his response to me was, please take those P's and R's out of this report. You're making me look dumb. Now, if you're not a statistics person, that joke might not fall on you, but what he was meaning was I had all the correlation coefficient is an R and the probability coefficient is a P, and, you know, that wasn't his language. He wasn't a statistician. And so what made me realize real quick is if we want data to drive change or communicate impact, we have to be very mindful how we capture the data and how we communicate the data. So that's just a fun story to share with you.

And so what we want to do is once we have our logic model, that ‑‑ like I said earlier, that's the universe of all things we can measure. We could then go through and there and measure everything, but we're not going to because it would be too much data. In some cases it might be kind of expensive to measure certain things. So we don't want to do that. But we have to define what are the best success measures. What are those things on our logic model we want to be measured? And so the first thing we want to do is we want to reflect on both the stakeholder as well as our own needs. So then we're going back to the five whys. So why we think about what you do what you do, why participants do what they do and why funders fund you, the best measures will be the ones that overlap in at least one or two of those areas. It's not going to mean you just have some measures that fall in your why bucket or your funders' bucket but you want to thank about those data points if you share them with your funders they get excited, you share them with your consumers, they get excited, and you share them with your team, they get excited. This is great had that how do we move this needle, use this to improve, so on and so forth.

Now, these are the O SILC global measures. What we did is we went from ‑‑ I'm going to read this ‑‑ I will go detailed through this slide because I think this is what you all want to know and go really detailed. But I will caution you that just because this is what O SILC decided for their core measures, I wouldn't want you to just uplift, take this and not really be thoughtful around, is this true for your state as well. Just because it's true for Ohio does not mean that it is ‑‑ that it necessarily is true for your state. But where the committee came together and agreed on were these measures. So the first was improve quality and effectiveness of services. So ‑‑ and how do we define that? Effectiveness of services reflects the extent the IL Network is increase the capacity of service providers and meeting needs of consumers and it includes the percentage that consumers meeting their goals as well as how long it take to achieve a goal and it also examines perception of quality and then cost per successful outcome. I'm just going to put a pause on the cost per successful outcome. We will go into that a lot in webinar three. So you will want to make sure you attend webinar three to learn about how powerful this cost per successful outcome is. So that was one of their core global measures, was to understand and tell the story of quality and effectiveness by looking at consumers meeting their goals, how long does it take for them to meet their goals, and then their perception of quality, so thinking about consumer experience, staff satisfaction. So that could be measured through a survey.

The next desired performance measure was increase elements of meaningful quality of life. So getting to that more medium‑term outcome. How do we measure ‑‑ do our services increase and improve the quality of life? And so this included constructs that allow an individual to fully live the life they desire within the needed supports that allows them to live this life. So the metrics that fell under this bucket were achieving personal health and well‑being, so the extent to which individuals reported they achieved those, the ability to overcome barriers to self‑fulfillment, exercising control over decisions and making choices based on personal preference. So, again, these are metrics ‑‑ they are ‑‑ they're qualitative but they can be termed quantitative through very structured survey question items. And I always really encourage teams, especially if you have to do a satisfaction survey, make sure that you're adding questions beyond just are you happy with our services? Really get at, did our services help you do this particular thing? Do you know if they perceive that your service achieved the outcomes that you're trying to have? The other core set of items that were important for Ohio was increased community participation of their work. So they looked at community participation was defined as a consumer successfully participating in a meaningful adult life. So ‑‑ this could be participation in recreation activities, volunteering, civic engagement or employment. So a range of obviously it's not appropriate or not every consumer necessarily wants to get a job or that's not part of their goal, but this is more looking at are consumers doing more in the community for meaningful well‑rounded life? And so that's measured by the activities and the goals that those particular consumers are achieving.

Then the next set of metrics were increase diversion/transition from more restrictive settings. This measured the ‑‑ successful of keeping people out of and transitioning consumers from nursing homes. So, again, that might not be relevant for every single program or every single consumer that you work with, but for a large percent of them it's about keeping them in the least ‑‑ the most independent setting as possible.

The next set of measures were increased awareness of Independent Living and Independent Living Services and the alignment of public perception. So then this is moving away from, if you kind of look at the way these particular items go in order, is the first measure is really a your why. The measure of quality and effectiveness. That's really about why the agency exists and they need to have quality of services, they need to be effective to manage resources and that's important to others, but that's really your why metric. Then the increased elements of meaning full quality of life, community perception, increased diversion/transition, those are more your consumers' whys and maybe your funders' why's, in terms of those are the outcomes consumers want, consumers funders want to buy. This next one increase awareness of Independent Living and in that living services, again that's going to be more of the IL Network's why, is they want to change community attitudes. It measures the ‑‑ and it also monitors how well the general perception of Independent Living and services align with the IL‑Network's ability to address those services and those needs.

Lastly, this had to do with the advocacy piece and making sure the network is measuring how well they advance policies and practices for Independent Living and equality. So the long‑term measuring is defined as a number of practice and policies an organization ‑‑ that the organization and public policy level that move forward because of the IL network efforts. This particular measure, it's ‑‑ as ‑‑ if you're engaged in advocacy and policy work, it doesn't happen overnight a lot of times. You may have only moved one policy change in the course of 18 months. But that's okay. It's just making sure you're tracking your advocacy efforts and celebrating your wins and capturing your wins. So that's a very high level. I will say the measurement framework, then, when it goes deep into the nitty‑gritty of how you measure all of these is much more detailed and robust, but this is just a real high level for you to get a sense of what are those performance measures, how they're classified and then the submeasures that fall under those.

And so when you are thinking about your own work, some of the things that ‑‑ that kind of highlights the outcomes and ‑‑ we ‑‑ we're going to ‑‑ your own work. If you have this data on ‑‑ on your clients, you would be very successful in creating a measurement culture. First you need to understand who are the people you are serving so you can do analyses by gender or by need type or by age or by Zip code. So you can really understand are there disparities that exist in your work or is there one group your population that's achieving outcomes at a greater rate than others. And so when we can link all of this data together, that's when we can start to have really cool conversations and make really good continuous improvement decisions.

You also, if you are engaged with a person over a lot of different services or a lot of different time, you want to make sure you understand their start and stop dates and the activities they receive because what we find is sometimes outcomes are correlated to the amount of service, and so, for example, let's say you have a 10‑week program, but people seem to stop coming at week 6, and you really are confused. So it looks like you're unsuccessful because you have all of these unsuccessful participants. But if you went and found their outcomes and measured their outcomes and you realized they stopped coming because at six weeks they were satisfied, they got what they needed, life was good, and so they moved on with their life. Well, then what you can do is you would naturally shorten the program or lobby if you had to shorten the program to six weeks and say, our data suggests that we can actually serve more people in a year because we can shorten this program to six weeks. Now, sometimes people find the opposite, that maybe they had a six‑week program and they're not getting the outcomes they want, and when they dig deeper and ask the consumers what's going o they realize that they ‑‑ it actually needs to be extended to 10 weeks because maybe those ‑‑ maybe what the program is missing, and this is a real example, an organization did this, and what they found was they were missing that trust and that rapport because they just went straight to tactics and activities with their consumers, and when they ‑‑ and they weren't being as successful. So when they learned this, they added four more weeks to their program where the first four weeks were all about trust and rapport building and really understanding the consumer's needs so that at the end they then got the successful outcomes. And so when you have that data you can then couple it with outcomes and make some really great decisions and continuous improvement.

In addition, of course, you need to know how much your programs cost, how much money you bring in, and we'll talk more about why that's so important in webinar 3, and then participant and stakeholder feedback. That's going to be your just quality data, your satisfaction data. Then lastly your outcomes and thinking about how are people better off because he have your services. The reason I say that's your true profit is because social sector organizations are not in the business necessarily to make money. They need money to deliver their great work and their programs and pay their staff, but at the end of the day, the reason that funders fund you is because they want to see that change you. They want to see those short and medium‑term outcomes occur and that's what they're buying. And so the more of those you accomplished, the more profitable, successful, impactful you are as an organization. That are so here is a test. When you are thinking about your particular measures and you think to yourself, okay, I think these are the right ones, here's a framework to decide if it is. So, first, agreed upon basis for decision‑making has to exist. So if you have a particular measure, so if it was percentage of people who understood what the IL‑Network did, then that data point should help you decide where you should put your marketing. Sit working? Do we need to change our message? It should give you information to help you make a decision. They need to be something you can understand. You want it to apply broadly across a lot of your different divisions and departments. So in this ‑‑ in the statewide example this had to apply across the entire network of 12 organizations. Also it needs to be interpreted uniformly. So making sure that when someone read what the measures is and saw the data they understood what that meant and how to apply it. This is really, really key. A way to measure it has to exist. So when I'm working with organizations, I always say, I will not let you select a measure that doesn't exist or you can't measure it or it would be too expensive, which is the last bullet. It has to be economical to apply. And then it has to have face validity, meaning that when you read that particular question, one would agree that it is measuring what you say it is. A good example of this that I would say doesn't have great validity is Columbus, Ohio has been deemed to be one of the most intelligent cities in the United States. So that sounds really cool. When I ask groups what do you think this means, I often hear, well, you probably have high IQs or something to do with education. And those would all be good face valid answers. If you hear someone say it's the most intelligent city, you immediately are going to think somebody got ahold of all their IQ scores and realized there is a high percentage of people living in the city that have IQs. As a Columbus, Ohio resident, I wish that was true. The reality is IQ has nothing to do with this measure. This measure looks at access to tech, jobs, number of universities in the city. It really has nothing to do with IQ. I would claim there is nothing wrong with that measure but they should call it something else. It does not have face validity. It's misleading.

So now when you are thinking about what outcomes to put on your logic model, here is a giant gift. There are only 12 outcomes. Now, you're going to define these differently, but what you can ask yourself, you can take this slide right here that's called outcome measures, and ask yourself, do we do this? If so, how do we define it? You might not do all 12, but just gives you a really simple place to start. So the first is increased knowledge and learning. So how do you increase people's knowledge, increase their capabilities, and that's a really easy one and those are typically short‑term outcomes. So you have a training class or you have an Information and Referral call. The second is changed attitudes. So this one, again, is related to maybe you're trying to change the perception of what an individual living with disabilities is able to do in the community. You're going to do that ‑‑ that typically is going to have to be collected through attitudinal surveys, maybe you ‑‑ if you wanted to do something really complex you could start to look at social media posts or comments, could be another way to look at that as well. Increased readiness. This is ‑‑ you know, are the people that you serve, are they ready for the next phase, whatever that is? Are they kindergarten ready? Are they ready to now go get employment? Are they ready to live independently? That's another outcome we see that's going to be defined different ways based on the kind of ‑‑ what the mission of that particular organization is, but that's one of the outcomes.

A reduction of undesirable behavior. So if there's a behavior that you don't want people to be doing and maybe it's you don't want people to be passing discriminatory policies, for example, you can measure the change of seeing that happen in your state or your community.

The opposite of that, increase in desirable behaviors. You can measure do you see more of something that you hope to occur? Again, maintenance avenue behavior. That's similar to increased desirable behaviors, but that measure is more like people didn't do this behavior and now they do, where maintenance avenue behavior is they keep it. So if we think about employment, going from not having a job to now having a job that could be an increase behavior. Now if they keep that job for one year, that's the maintenance of a new behavior.

Increased social status. That can often be measured by income or career growth.

Increased economic conditions can be looked at from a community level, is the community strengthening in terms of their opportunities.

Increased health ‑‑ or improved health condition, increased health conditions, are people healthier? That's typically measured by things such as medical data.

And then reduction in administrative costs. This in my opinion is not really an outcome, but because Guidestar and others are using this particular metric to evaluate charities I have it on the list because I acknowledged it is something people look at and you should be aware of it, and if you can figure out how to reduce your administrative costs it will be a measure of efficiency.

Increased economic development. That's typically more around if you are doing community work and measuring job creation or businesses coming into community, maybe not so relevant for this audience.

Then lastly it's more of the quality piece, and that's just around stakeholder satisfaction with the work and with the effort. So hopefully those 12 help jog your thoughts and your thinking about really what your organization and your state is doing to move the needle in these different 12 buckets.

And then once you have gone through that process and you think, okay, these are our core measures, this would really help us be more efficient, be more effective, tell our story, decide where to invest our resources and our time and energy, or ask for money, or lobby our legislature, ask yourself these questions before you solidify this. So are they related to important policy and practice issues? So, again, is that something that you could take to your legislative body and have data around that and they would be interested in giving you more money for your cause or changing policy to your cause.

Also, are the measure relevant and apply to practitioners. There I just talked about maybe external stakeholders, but also do you have measures that if I'm a line staff worker and you show me this data, I can brainstorm ways to improve our performance or to improve our efficiency or celebrate our success and get excited about that.

And then thinking about can the measures be communicated in a way that will influence outcomes. If I shared this with anyone, will they care, will they be excited, will they want to engage with my organization, will they want to give me money, will my staff be motivated to work harder to do things like that. And then thinking about are there incentives built into the system for collecting and acting on this data. When I say incentives, I don't necessarily mean pay or money. I just mean, can you or will you structure your organizations in a way that staff know that this is important. The data entry, the data collection is important. Maybe Jeremy can help us think through ways Ohio has been doing or thinking about that. Lastly are the measures linked to the stakeholders interests. Again, do stakeholders care once we collect all this and does it help us? So that's just some questions to vet your different measures to make sure that you're measuring the things that will matter and they'll drive change.

Now we talked a little about surveys. Because when we talking about human service change, the ‑‑ except for like completion of goals and time it takes to complete a goal, and policy changes, a lot of that the things in the social sector we're measuring they are survey data. They are going to be questions that you ask people about their perceptions of are your survey, how their life has changed since engaging in your work. So I want to caution us all that there is a science to good measurement and good service delivery, and if we have bad survey questions, we're going to get bad responses. And so just be very careful that how you word a survey is very, very important. We need to make sure we are neutral and we avoid leading questions. So don't ask, was our staff helpful and friendly? For example, that would not be a good question because one person could be really, really friendly, but not helpful at all. Or the other end of it. Someone could be helpful, but they could be really a pain to work with that you want to avoid like the plague. So just when you are looking at the items you decided to write, if you are using a survey, make sure there is only one way to answer that question, there is only one thing it's measuring in that question.

So that goes back to ask one item at a time. Don't try to lump items together. This is really key, especially if use using a survey you created on your own. Make sure you test the questions first. Invite some of the audience in which you hope to answer these questions, invite them to take the survey with you right there and have them talk out loud how they would interpret that question and how they would ‑‑ just to make sure that how they're interpreting it and reading it is what you intend for them to want. And then really do your best to keep your surveys short. Really ask only the most important questions. The most important questions that are related to your ‑‑ to measurement framework. That's why it's so important to go from five why's, logic model, measure selection before you develop your tools because if you do it the opposite way, you might end up with a lot of questions that don't have any relevancy and not providing much value to your organization and you're wasting your consumers' time by asking them to fill it out.

So how are you going to get this data? Very first and foremost, we do this ourselves as a research firm. The first place we go is always existing data sources, and we conduct a literature review. Use those tools to your advantage. There's university groups, there's research groups who have already done the testing, validated the surveys. They have research reports that shows that this can be used for outcomes tracking. So when they exist, start there first, don't totally recreate the wheel. Use the tools you have. Jeremy is going to talk about how they used what they had to modify it to get to where they are today. Obviously there are free and low‑cost tools you can use like a Survey Monkey. Excel, although it pains me to say it at times, if all you have is Excel, start there. Most people have Excel on their computers. What I think is really key, and this is what Ohio did, they defined success first. They defined their measures first before they then took it to a technology vendor to help them build it out. I think this is really, really key. If you want to build something custom to help you track and measure your data, they're going to build you whatever you say. So if you are really clear on what it needs to do, you're doing the vendor a favor and you're really helping them develop something for you, and if not, they're not going to know what you need.

And so here is the ‑‑ this is when we talk about a measurement framework, this is Ohio measurement framework. You can see they have metrics around what was done by the Independent Living network, things around capacity building and meetings convened, information advocacy, commune engagement efforts, people served and engaged. Contact hours, units of service and number of referrals made. So, again, that's more of your output efforts. And then there's a bucket of quality. How well was it done? That's looking at number of populations reached, percentage of populations reached, percentage of consumers or partners who report positive experience with the services, percentage of partners who report increased capacity, and so that means that the partners feel like they have ‑‑ they can do their jobs better. Percentage of consumers who completed goals on the Independent Living plans. And then percent increase in awareness and alignment of the Independent Living network and services and then cost per success. Those are those quality measures. They do live in an outcome bucket but the real important thing is how are people better off? So for the statewide network, the way we look at that, is the percentage of eligible consumers successfully transition/diverted to less restrictive environments. Also percentage of consumers participating in adult meaningful life. So I already talked about these earlier. The number of policy changes at the state, local and organizational levels. Percentage of consumers who report increased independence. Then the percentage of consumers who report improved quality of life. The reason we actually go to this measurement framework, we have everything written in the terms of percent, is because that now gives us, for most of them, it gives us a way to measure it year over year over year instead of target for strategic planning and improvement. So when we have a percentage as the outcome it gives us an ability how we want to improve or is that good and we want to maintain that particular number.

All right. I have thrown a lot at you and I have talked a lot. Now I want to bring Jeremy back in to really help contextualize this. I ‑‑ I mean, this process was a several‑month process with a lot of input from all of the centers across the state, and so I'm just giving you the end product at a high level but he can help really identify what they're doing with this. Jeremy, where is the Ohio's IL‑Network in the implementation of your measurement framework?

>> JEREMY MORRIS: Well, as anyone who is on the call can imagine, working with every CIL and the SILC in the entire state it has caused us to have a lot of conversations about how we're doing things, what's going on, and it's made us really take a lot of steps in going through this process. So we are still working on our background for the implementation of this. We have gone through and worked on fine tuning the data points we will be tracking, at least for now. We have a starting set we're going to be tracking. And we have taken that and we're building that into the database that the CILs are using so that that way we wanted to try and create a system that doesn't create a huge reporting burden for them so that we weren't adding a lot of extra work to what everyone was already doing, fine tuning ‑‑ so as we went through, fine tuning some of the data we are collecting, figuring out where the gaps are that we need to address going forward, and then hopefully October 1st we will actually be able to start real time collection of a lot of this ‑‑ a lot of this data so that we can ‑‑ we know that next year we'll be more fine tuning as we go through a and start seeing a lot of this coming back, and it may point to where we need to do some increased training, we need to have the centers working together to make sure that everyone is collecting things in a similar fashion, because we know that that's something that we all need to work on more.

>> SHERI CHANEY JONES: Great. So you talked a little bit about it, but ‑‑ you know, no issue is pain‑free. So what obstacles have you had to overcome in getting to where you are now?

>> JEREMY MORRIS: So as we went through this process, we also had every‑‑ everyone went through a database conversion. So there was a lot of pain that was happening at the same time, and as we went through that conversion process, we realized the things that we thought everyone was doing and we had worked really hard in the past to try and get everyone measuring and reporting things in the same way, it wasn't happening that well. We thought we were. We all thought we were doing things the same way, but we quickly found out we weren't, because when the databases were being transferred, it wasn't as smooth as possible because we had to go through and figure out where certain things were at each center because everyone's data was even being entered in different places. So that's one of the things that we are working ‑‑ and we're still working with the centers to come up with effective ways that everyone at the center can be trained to understand the data better. Because if you hand the 704, the PPR report, if you hand that around to a new staff person at a CIL or the SILC or a board member, are they going to understand ‑‑ are they first going to understand the data? But then are they going to understand how that data came to be? So making sure that the staff at the CILs who are working with individuals every single date, who are really doing the hard work, making sure that they understand how they are fitting into this and making sure that they see their piece in in this large picture of the impact that we're having throughout the state.

>> SHERI CHANEY JONES: Great. So how is having this framework helped you overcome some of those obstacles or ‑‑ I know you're not yet to the place where you're collecting this data, but has there been any benefit to date?

>> JEREMY MORRIS: Well, I mean, some of the things that we've already seen is this was ‑‑ a lot of this conversation came from problems that we had in the past with our designated state entity. You know, the state of Ohio is pushing in the direction of data‑driven information, and we were falling far behind. And our designated state entity I think was one of the leaders, and we're going to move to data‑driven metrics, and they have a scorecard that they present to the legislators that show, look, here is what we're doing, here's our impacts, you can easily see it. So this past year we were able to at least show, look, here's the steps we're going to be taking. Here's what we will be measuring. And here's how we are going to be able to be self‑accountable to what we're doing, and that helped get a line item back in the state budget for the CILs.

>> SHERI CHANEY JONES: Wow. That's amazing. Congratulations.

>> JEREMY MORRIS: That was a big thing. Yeah, that was something that a lot of people, you know, they keyed into that really quickly. Oh, you guys are telling me how you are going to measure what you're doing. We're not going to have to guess at what the impact of us giving this funding is. You're telling me right here what I can look forward to seeing in a year's time.

>> SHERI CHANEY JONES: Yeah. So what kind of stress does that create on you? Any?

>> JEREMY MORRIS: It has been ‑‑ it's been a fun experience, but ‑‑ I mean, it's been a lot of things to put together and really try and work with ‑‑ again, you have the SILC and 12 CILs all trying to come together around the same language and the same things, and at the same time we also had the state plan being revised, and we had the state budget process going on. So, unfortunately, I think we would be a lot farther along had everything else not fallen in line at the same exact time, but we also ‑‑ we didn't want to rush this. So we made that ‑‑ it was ‑‑ we'll take our time, we'll make sure this is done correctly, and I think had we rushed it I probably ‑‑ I probably would have a different answer.

>> SHERI CHANEY JONES: Sure. No, I think that was really smart, and just the fact that people took notice to you have been thoughtful, and although you might not have the metrics yet, you have been thoughtful and planful on what you're measuring, why you're measuring it and it resonated enough to get a line item in the budget. That's amazing. Congratulations.

So this is a great time to ask questions of Jeremy and of me. If you still me need to clarify how to measure something, I'm happy to answer those questions.

>> CAROL EUBANKS: We have one on here. It says: Are you concerned once you have implemented this process that ACL will require you to collect other types of data to measure outcomes in the APR, increasing the data collection burden on CILs?

>> JEREMY MORRIS: Of course we are. You know, there were some things that we had ‑‑ we had started talking about when the first draft of the revision for CILs came out, and we held off on certain things, and as we went forward, we wilt a lot of the data points that we were going to be measuring around some of the most basic things that we were already collecting, and we believe that we should be collecting no matter what. So when we look at even just service hours, you know, that's something that the CILs are always going to have some type of tracking of what their staff is doing. When we look at some of the advocacy efforts. You know, what are the things that are happening that we can really key into. So I'm hoping that as the new tools and new data points get collected at the federal level it's not going to ‑‑ it's not going to be a major shift in what we're doing. It may cause us to tweak a couple things, and that's something that we hope to in the future have at least one person from each CIL on a workgroup that is meeting to review all of this on a regular so as that does come up we'll make revisions. We'll make sure this isn't going to be something that cause as lot of extra work for the CILs because there's already enough work that you guys are having to do.

>> CAROL EUBANKS: We have another one. You spoke a little bit, Sheri, bit, but it says: What are some good resources for collecting demographic data on participants?

>> SHERI CHANEY JONES: So I don't know if the question where to learn what demographic data to collect or what demographic data you should collect. I'm not sure what specifically that's addressing. But where I start with is I think about who ‑‑ get really clear on who are you serving. And so if you want to be able to describe and prove that you are serving who you say you are serving, then those would be the type of demographic information you would want to collect on your individuals. So if it's important to you that if you can look at your data through equity and gender, so around race or gender lines, if type of disability is important to you to make sure you are inclusive and can serve all people's needs, that might be a great demographic question. Sometimes it might be beneficial to you to ask questions related to one's financial status or benefits they receive because that might help you target the type of needs that they have or the extra resources they have. So when I say demographics, it's those types of things. And I don't think we should just ask ‑‑ I think we should always be respectful of the people we serve and not just ask a lot of personal information about them just because. So, you know, I don't know that there is a core set you should ask or a core set you shouldn't unless your funder requires it, but really be mindful, what are you going to do with that data? How will knowing that about your particular population help you in telling your story and to delivering better service to them?

>> CAROL EUBANKS: Well, we don't have any more questions right now, but if you guys can think of something that you would like to ask, we have a few more minutes. Please submit it in the Q&A tab at the bottom of your screen.

>> SHERI CHANEY JONES: While people might be thinking about additional questions, I'll kind of wrap us up here. So what are the take‑home activities? So I recognize there are some trainings that you can give someone a part of an hour‑and‑a‑half webinar and a person is, like, yep, I got it, I'm ready to go. But, unfortunately, this type of exercise, every state is going to be different. Every CIL is different. It does require some homework. If you really are committed, if you remember back to webinar 1 and you think to yourself, this is important because of what it can do for my organization, what it can do for my clients, what it can do for the resources we have to do our work, like, maybe you can get a line item or greater line item in your budget, it will require you to do some work. And so I have provided the tools or the steps for you to take back and start thinking about this and brainstorming these activities. So activity 4 in your workbook is the five why's exercise. So take the time to go through that and do that. And then once you do that activity five 5, you can take a go at the logic model. And activity 6 is some guided measures to help you are through your measurement selection. All of these activities when measurement resources works with O SILC or other clients, some of these ‑‑ or most of these we have them do to some extent but then we do a lot of them for them as well. You really have all the tools necessary and the steps necessary to move towards creating your own measurement framework. Do the five whys, the logic model and work through the measurement selection activity, and then that will give you to a place where you would have a logic model, you would have your desired metrics, and if you have any questions next week ‑‑ or next webinar about specific measures, I'm happy to answer them because you have given them some thought on how you could measure them or what good questions might be, and then we're going to talk about, so once you ‑‑ once you put your measurement framework into life, into being, how do you, then, communicate that impact, tell your story to raise more money and drive results? And different ways to think about communicating your impact with the data that you have.

And so that is all I have to share with you today. If there are any other questions. Jeremy and I are happy to answer them. Carol, if you have other things, feel free.

>> CAROL EUBANKS: We don't have any questions right now. I'm watching and looking. Nothing is coming up. So I think we can start wrapping this up. And so you can see on the screen that directly following the webinar you will see a short evaluation survey to complete on your screen, and we want to emphasize that we really would like for you to complete this because we do care about your feedback. It helps us to make our programs better.

So I think that's it. So thank you so much, Sheri and Jeremy. We will see you again on September 12th, and we hope to see all of the participants there also then. So take care, everybody. Bye.

>> SHERI CHANEY JONES: Bye.