



WINTER

“Breaking Barriers, Maximizing Impact”

Managing Performance: Data in the Network

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How do you know if your agencies are on track?



What sources of data do you have from your agencies?



Annual Report Data



CAP Plan



Needs Assessment



Strategic Plan



Customer
Satisfaction Data



Financial Data

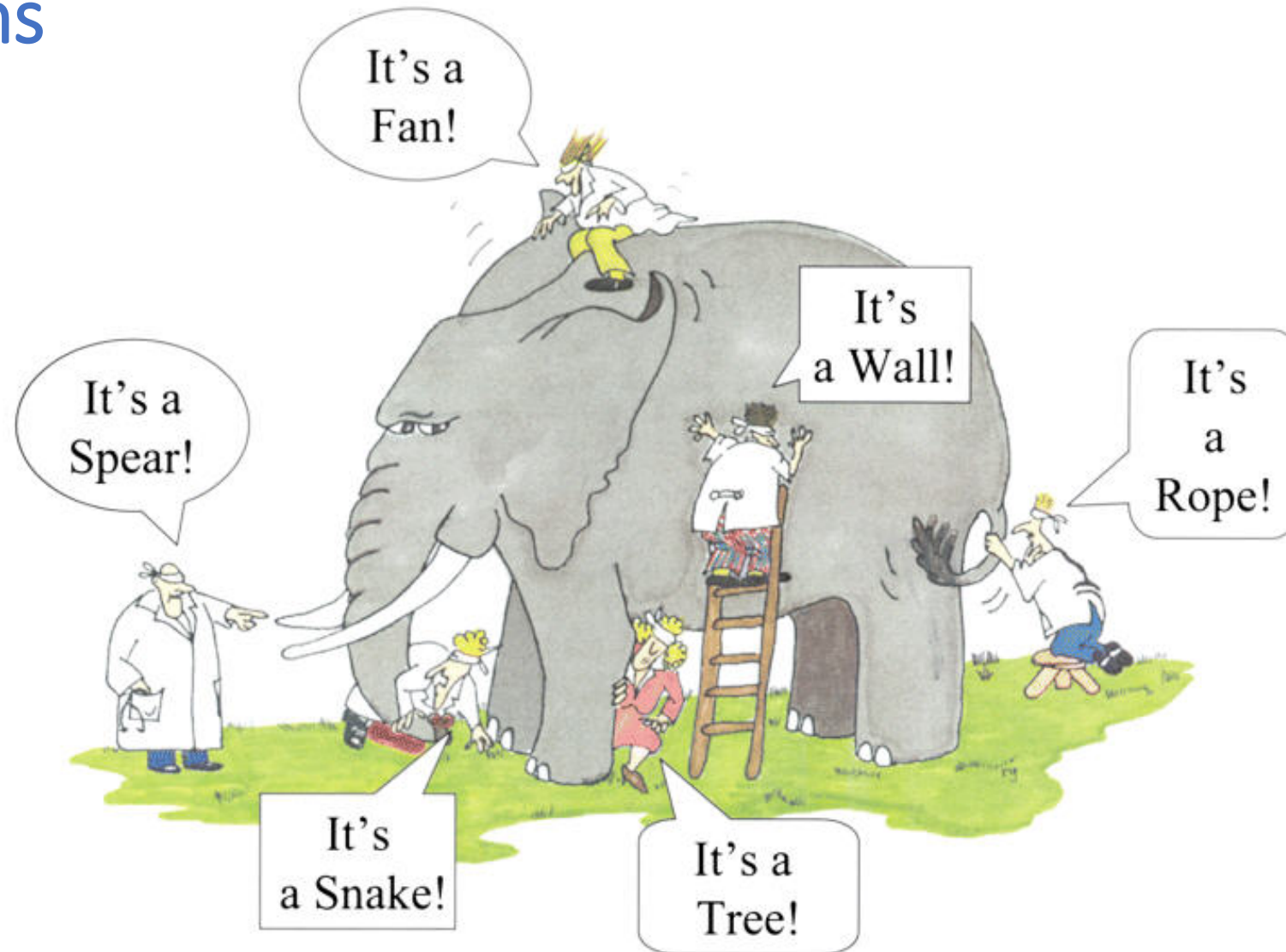


Other Program Data
(HUD, Head Start,
TANF, LIHEAP)



Organizational
Standards

You Need a Complete Picture to Make Data-Informed Decisions



CSBG Annual Report



OMB Control No: 0970-0492
Expiration Date: 01/31/2020

Community Services Block Grant (CSBG) Annual Report

Role of the CSBG Annual Report



Fulfills CSBG Act requirements.



State Plans are required and indicate how the State *plans* to operate CSBG and use CSBG funding.



Annual Reports are required and indicate how the state *actually* operated and used CSBG funding.



Provides information on State progress with organizational standards and state accountability measures



Provides information for OCS, State and local CAAs to use to manage and improve results.

CSBG Annual Report

Module 1

- State Administration

Module 2

- CSBG Eligible Entity Expenditures, Capacity, and Resources

Module 3

- Community Level

Module 4

- Individual and Family Level

What Data is in my Annual Report?

Module 2: Agency Expenditures, Capacity, and Resources

- Funds spent by eligible entities on the direct delivery of local services and strategies
- Capacity development
- Information on funding devoted to administrative costs by the eligible entities

RAW DATA COLLECTION: General Ledgers, Expenditure Tracking, Program Tracking, Certification Tracking, Community Partner List

Module 3: Community Level

- Implementation for community-level strategies (Community Level indicators for each domain)
 - Baseline
 - Target
 - Actual Results
- Results achieved for community-level strategies

RAW DATA COLLECTION: Community Initiative Tracking

Module 4: Individual and Family Level

- Each Domain's indicators contain data elements by:
 - Targets
 - Results
 - Percent Achieving Outcomes
 - Performance Target Accuracy
- Services provided to individuals and families
- Demographic characteristics of people served by eligible entities

RAW DATA COLLECTION: People and Households served Tracking System

INDIVIDUAL AND FAMILY LEVEL



Indicators provide a means to measure achievement of or movement towards the long term goals.



Document the number of people who receive services, the number who achieved outcomes, and their demographic data.

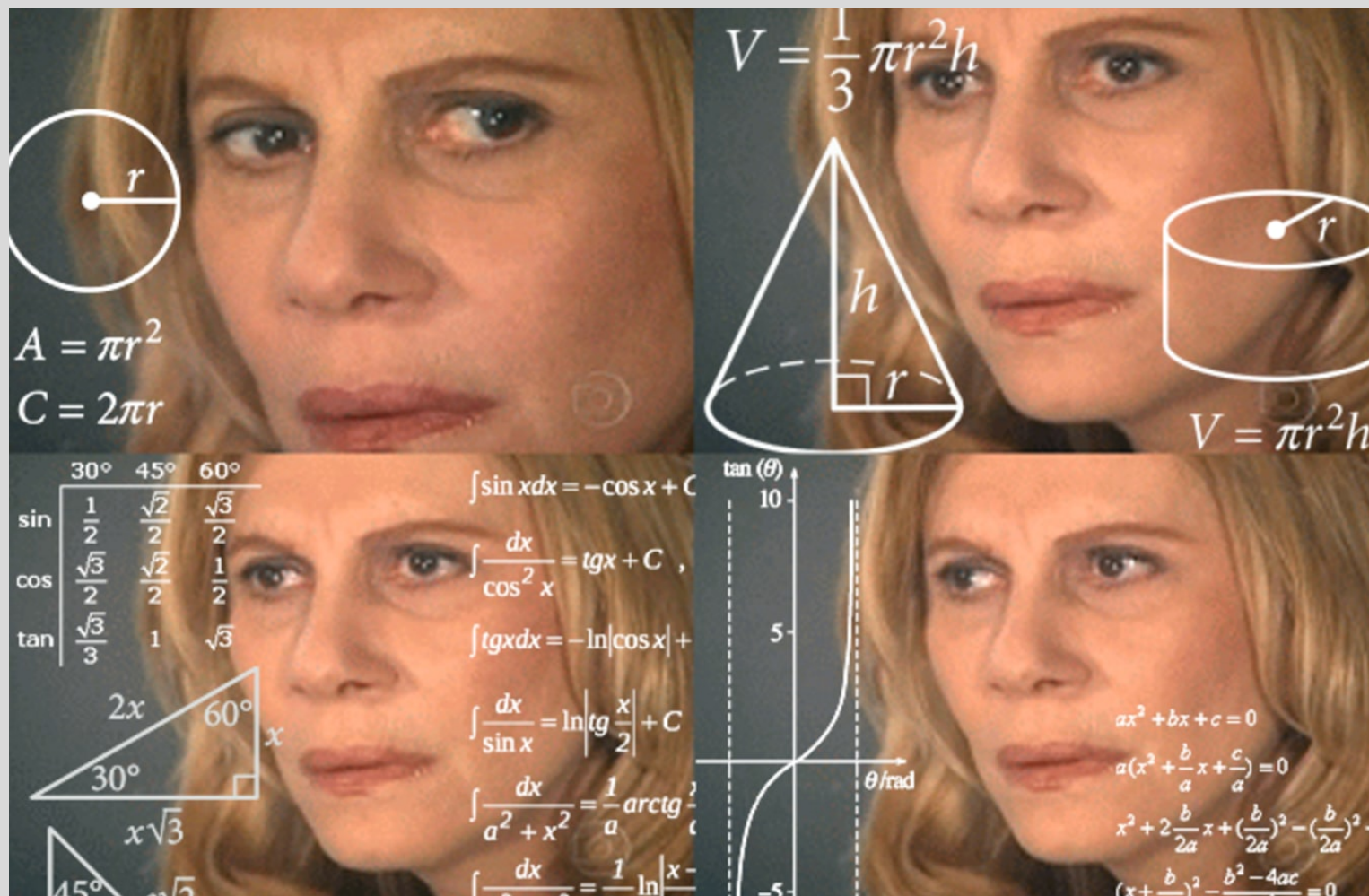


Provide data for analysis:

- What change was expected?
- What change happened?
- How does the actual change compare with the expected change?
- How accurate were the projections
- What percent of people served achieved the outcome?

Annual Report Data Analysis

What do I do with my agencies' data?



Changing The Way We Think About Collecting and Reviewing Data

It is important to change the mindset

from

“we collect data for reporting purposes”

to

“we collect data to help manage and support the agency’s programs and services and determine if we make a difference in our client’s lives and in their communities.”

AND

We review the data to ensure agencies are reporting correctly and ultimately fulfilling their missions

Data Review

- Completeness and Accuracy
- Compare outcomes to demographics
- Ensure the report is making sense across all modules
 - Funding>services>outcomes>demographics

Data Analysis

Data Analysis is the **process of exploring data and reports** in order to extract **meaningful insights**, to better understand and **improve agency performance**.

- **Tasks:** Analysis focuses on tasks including questioning, examining, interpreting, comparing, confirming, and testing with the goal of **discovering useful information, conclusions, and supporting decision making**.
- **Outputs (purpose is to provide insights):** ad hoc responses and analysis presentations (infographics, annual reports, strategic plans, CAP plans, community needs assessments)

Data Analysis

Data Analysis is the **process of exploring data and reports** in order to extract **meaningful insights**, to better understand and **improve agency performance**.

- **Context:** Context is critical to good analysis. In order to tell a meaningful story with the data to drive specific actions, context becomes an essential component of the storyline. It emphasizes data points that are significant, unique, or special – and explain why they are important to the agency.

The goal of analysis is to answer questions by **interpreting the data at a deeper level, identifying findings, and providing actionable recommendations**.

ROMA NG Questions



- Did the Outcomes achieved address the needs identified in the assessment phase?
- How well did the agency track their success?
- Did the agency meet its targets? Does the agency know why or why not?
- What has changed for the people served?
 - What has changed for our community?
 - What Outcomes were achieved and for whom?
 - What Services and Strategies contributed to achieving the Outcomes?
 - What can the agency improve to better respond to local needs?

Questions You Want To Answer With The Data

- Did the agency do what they thought they would do?
- Did they serve the population they thought they would serve?
- Did they make an impact on the identified needs?
- Can they tell what services (or set of services) produced the best opportunity for results?
- Are some populations achieving outcomes at different rates than others?
- Did they recruit and enroll sufficient numbers to allow them to achieve their target outcomes?
- Do they need additional resources?
- Was there something unexpected that influenced the outcomes?

Did They Measure the Right Things?

- Compare services to outcomes
 - Are the outcomes making sense in relation to the services being provided?
 - What is it the agency is really trying to measure? How can they measure it?
 - What are some things a State Office could do to help agencies measure their outcomes?

FNPI 3h The number of individuals engaged with the Community Action Agency who report <u>improved financial well-being.</u>	485	485	485	100%	100%
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Income and Asset Building Services (SRV 3)	Unduplicated Number of Individuals Served
SRV 3o VITA, EITC, or Other Tax Preparation programs	485



Needs Assessment Data

What does Needs Assessment Data tell us?

- Level and extent of particular needs
 - Housing, Health, Employment, etc.
 - Does the agency work to address those needs?
- Strengths in the community
 - Is the agency seen as a strength?
- Gaps in the community
 - Is the agency addressing those gaps?



What could Needs Assessment Data tell us if we...

- Compared outcome data to assessment data?
 - Did the outcomes match the identified needs?
 - Was there an underperforming program that was due to a missed community resource?
- Compared service data to assessment data?
 - Uncover that needs were not identified in assessment?

CAP Plan Data

What data is in the CAP Plan?

- Targets and goals for the upcoming year
 - What NPIs the agency is planning on pursuing
-
- Are these in line with the results from the past Annual Report (or past two, three, etc.)?
 - Are they adjusting targets?
 - Are they redirecting efforts or shifting focus?
 - Are the changes in line with the Community Needs Assessment?

The background of the slide features a collage of financial data. A large magnifying glass is centered over a list of numbers, including +59.070, +21.547, +1.747, +1.953, +2.648, +4.892, +3.214, +458, +36.459, +21.520, +1.547, +42.631, +17.850, and +1.422. To the right, a 3D pie chart shows segments labeled 7%, 8%, and 3%. At the bottom right, a 3D bar chart displays several vertical bars of varying heights. The text 'Financial Data' is overlaid in a large, white, sans-serif font.

Financial Data

What does Financial Data tell us?

- Total Resources, including other main funding streams
- CSBG Expenditures by Domain
- Planned allocations vs expenditures and carryover



What could Financial Data tell us...

- Is the agency receiving the resources it needs to be successful?
- Could the agency have the capacity to invest in larger community level projects?
- How do their expenditure domains relate to the needs and goals identified in the Community Needs Assessment, the Strategic Plan, the CAP plan, and previous Annual Report trends?
- What seems to be the cost per outcome, per service, or per client? How does that relate to other agencies doing similar work or in similar environments? Is there opportunity for shared learning there?

STANDARDS



CENTER OF EXCELLENCE
DEVELOPED CSBG
ORGANIZATIONAL STANDARDS

Community
1140 Connecticut

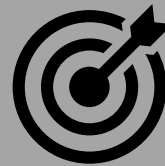
Organizational Standards Data

NASCSP 2020 Winter Conference | Managing Performance | February 25,
2020

What can Organizational Standards Data tell us?



How are agencies performing in each of the 9 domains?



Where are our best performing domains?



What domains do we have the greatest opportunity for improvement and TTA?

What could Organizational Standards Data tell us if we...

- Paired it with Needs Assessment data?
 - Does their needs assessment identify the same areas of need and strength in their organization?
- Compared with the Strategic Plan?
 - Does the Strategic Plan align with the areas of agency improvement identified in the Organizational Standards?
- Compared with Annual Report trends?
 - Does performance on outcomes and services improve with better compliance?



Other Program Data

What can Other Program Data tell us?

- Performance of agency programs
 - LIHEAP, Head Start, HUD, Nutrition, TANF, etc
- Funding from other programs



What could Other Program Data tell us...

- Is the agency dependent upon a singular funding stream, like Head Start?
 - If so, what does their monitoring report for these other funding streams look like?
 - Is the agency in need of any additional T/TA because of concerns about performance for another funding stream?
- Are the other funding streams in line with the needs identified in the Community Needs Assessment or are needs being identified because of a funding stream availability?
- Are outcomes and services from these other programs being reported in the Annual Report? Are there ways to report outcomes and services from other programs in a way that matches how this information is being reported for those other programs?



Customer Satisfaction Data

What does Customer Satisfaction data tell us?

- Overall, satisfaction of agencies with the State Office:
 - Communication
 - T/TA
 - Monitoring



What could Customer Satisfaction Data tell us...

- Were there T/TA needs identified by your agencies that could explain things you're noticing in your review of the Community Needs Assessment, the Strategic Plan, the Organizational Standards, the Annual Report, etc?
- Are agencies confused about requirements?
- Do agencies feel like they need more training or communication in order to be better equipped to fulfill requirements?

A person in a dark suit stands in the foreground, facing away from the viewer. Behind them is a large, light-colored keyhole shape that appears to be cut into a dark green chalkboard. The chalkboard is covered with faint, white mathematical formulas and symbols, including $E=mc^2$, H_2O , $\pi r^2 h$, $\ln x$, $\log_2 x$, $\sin x$, $\cos x$, $\tan x$, $\cot x$, $\sec x$, $\csc x$, \sqrt{x} , $\frac{1}{x}$, $\frac{1}{x^2}$, $\frac{1}{x^3}$, $\frac{1}{x^4}$, $\frac{1}{x^5}$, $\frac{1}{x^6}$, $\frac{1}{x^7}$, $\frac{1}{x^8}$, $\frac{1}{x^9}$, $\frac{1}{x^{10}}$, $\frac{1}{x^{11}}$, $\frac{1}{x^{12}}$, $\frac{1}{x^{13}}$, $\frac{1}{x^{14}}$, $\frac{1}{x^{15}}$, $\frac{1}{x^{16}}$, $\frac{1}{x^{17}}$, $\frac{1}{x^{18}}$, $\frac{1}{x^{19}}$, $\frac{1}{x^{20}}$, $\frac{1}{x^{21}}$, $\frac{1}{x^{22}}$, $\frac{1}{x^{23}}$, $\frac{1}{x^{24}}$, $\frac{1}{x^{25}}$, $\frac{1}{x^{26}}$, $\frac{1}{x^{27}}$, $\frac{1}{x^{28}}$, $\frac{1}{x^{29}}$, $\frac{1}{x^{30}}$, $\frac{1}{x^{31}}$, $\frac{1}{x^{32}}$, $\frac{1}{x^{33}}$, $\frac{1}{x^{34}}$, $\frac{1}{x^{35}}$, $\frac{1}{x^{36}}$, $\frac{1}{x^{37}}$, $\frac{1}{x^{38}}$, $\frac{1}{x^{39}}$, $\frac{1}{x^{40}}$, $\frac{1}{x^{41}}$, $\frac{1}{x^{42}}$, $\frac{1}{x^{43}}$, $\frac{1}{x^{44}}$, $\frac{1}{x^{45}}$, $\frac{1}{x^{46}}$, $\frac{1}{x^{47}}$, $\frac{1}{x^{48}}$, $\frac{1}{x^{49}}$, $\frac{1}{x^{50}}$, $\frac{1}{x^{51}}$, $\frac{1}{x^{52}}$, $\frac{1}{x^{53}}$, $\frac{1}{x^{54}}$, $\frac{1}{x^{55}}$, $\frac{1}{x^{56}}$, $\frac{1}{x^{57}}$, $\frac{1}{x^{58}}$, $\frac{1}{x^{59}}$, $\frac{1}{x^{60}}$, $\frac{1}{x^{61}}$, $\frac{1}{x^{62}}$, $\frac{1}{x^{63}}$, $\frac{1}{x^{64}}$, $\frac{1}{x^{65}}$, $\frac{1}{x^{66}}$, $\frac{1}{x^{67}}$, $\frac{1}{x^{68}}$, $\frac{1}{x^{69}}$, $\frac{1}{x^{70}}$, $\frac{1}{x^{71}}$, $\frac{1}{x^{72}}$, $\frac{1}{x^{73}}$, $\frac{1}{x^{74}}$, $\frac{1}{x^{75}}$, $\frac{1}{x^{76}}$, $\frac{1}{x^{77}}$, $\frac{1}{x^{78}}$, $\frac{1}{x^{79}}$, $\frac{1}{x^{80}}$, $\frac{1}{x^{81}}$, $\frac{1}{x^{82}}$, $\frac{1}{x^{83}}$, $\frac{1}{x^{84}}$, $\frac{1}{x^{85}}$, $\frac{1}{x^{86}}$, $\frac{1}{x^{87}}$, $\frac{1}{x^{88}}$, $\frac{1}{x^{89}}$, $\frac{1}{x^{90}}$, $\frac{1}{x^{91}}$, $\frac{1}{x^{92}}$, $\frac{1}{x^{93}}$, $\frac{1}{x^{94}}$, $\frac{1}{x^{95}}$, $\frac{1}{x^{96}}$, $\frac{1}{x^{97}}$, $\frac{1}{x^{98}}$, $\frac{1}{x^{99}}$, $\frac{1}{x^{100}}$. The text "Data for Making" is overlaid in large white font.

Data for Making

Using Data for Decision Making

Decision Support




Good Decision Making considers both data and experience.

- Reporting shows you **what is happening**, while analysis focuses on explaining **why it is happening** and **what you can do about it**.
- Data Analysis's **recommendations** provides specific guidance on what actions to take based on the key insights found in the data. Once a recommendation has been made, **follow-up** on a decisions is next (go/no go/explore further). Decision will be used in the next round of **ROMA Planning and Implementation**

Bringing This Together

- It's not enough to analyze your data, you have to USE it.
- Bring together the players in the State Office and local organizations to make decisions informed by data analysis of each of these components .





Things to ask your agencies to consider



Annual Report Data Analysis Can Inform Decisions In...



Development/Revision of their local
Theory of Change



Strategic Planning



Program Structure/Implementation Plans



Resource Planning

The National Community Action Network Theory of Change

Community Action Goals

Goal 1: Individuals and families with low incomes are stable and achieve economic security.

Goal 2: Communities where people with low incomes live are healthy and offer economic opportunity.

Goal 3: People with low incomes are engaged and active in building opportunities in communities.



Services and Strategies

Employment



Education & Cognitive Development



Income, Infrastructure & Asset Building



Housing



Health/Social Behavioral Development



Civic Engagement & Community Involvement



Core Principles

- Recognize the complexity of the issues of poverty
- Build local solutions specific to local needs
- Support family stability as a foundation for economic security
- Advocate for systemic change
- Pursue positive individual, family, and community level change
- Maximize involvement of people with low incomes
- Engage local community partners and citizens in solutions
- Leverage state, federal, and community resources

Performance Management

How well does the network operate?

What difference does the network make?

- Local Organizational Standards
- State and Federal Accountability Measures
- Results Oriented Management and Accountability System

- Individual and Family National Performance Indicators
- Community National Performance Indicators

A national network of over 1,000 high performing Community Action Agencies, State Associations, State offices, and Federal partners supported by the Community Services Block Grant (CSBG) to mobilize communities to fight poverty.

Theory of Change

- What does the agency understand about poverty in their community?
 - Does the data support their assumptions?
- Is their theory of change consistent with their plans?
- What services and strategies lead to desired outcomes?
 - Do they need to update their Theory of Change to reflect different strategies or outcomes?
- Did they reach the goals they established?
 - Were they the right goals?



Strategic Plan



- Did analysis uncover change in the community/makeup that impacts their strategic goals?
- Do they have the necessary agency capacity to reach strategic goals?
 - Employee credentials
 - Expertise
 - Funds
 - Partners
- Are their goals attainable?
 - Do they need to update large strategic goals based on performance?

Community Action Plan/Implementation



- Changes to programs
 - Strengthen/abandon
 - Strategies
- Changes to performance targeting
- Changes to fund allocation
- Who operates programs?
 - Staff credentials, expertise
- Partnerships

Resource Planning

- Based on prior performance, do they have the right resources to reach program or strategic goals?
 - Human Resources
 - Funding Resources
- Do existing resources need to be realigned?
 - Move resources from underperforming programs or those with less strategic value to the organization to those that maximize investment



Group Activity

Review the sample
Module 4 forms at your
table.

- ❖ What are some questions you might ask your agency?
- ❖ What are some things you would ask your agency to consider for future planning purposes?



Questions?

