

2024 National Association for State Community Services Programs Annual Training Conference

If services are possibilities, what realities are achieved?

September 16 – 20 | Renasant Convention Center | Memphis, TN



Workshop Description

Performance Management provides a process to manage both the delivery of services and the documentation of results.

It is important to make the connection between services and outcomes, but that is not the only connection to consider!

Once you have a process of oversight of service delivery in place, you can further explore other elements that can impact program operations and achievement of results.

A checklist can be helpful to assess and analyze these elements.





Performance

Evaluation

Accountability

Accessibility

Knowledge



PEAAK Performance



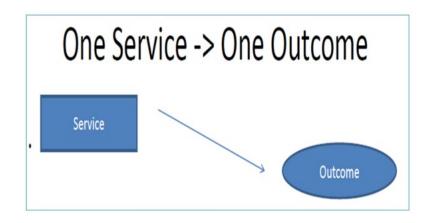
PEAAK Performance

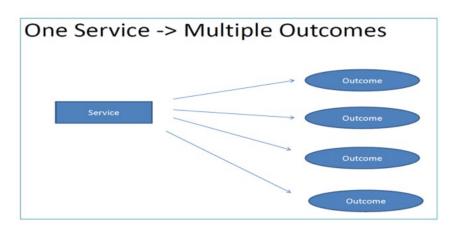
- Performance measurement
 entails the ongoing collection of
 data about both services and
 outcomes as a program
 progresses toward
 preestablished goals.
- Performance management is the comprehensive process that brings measurement together with assessment and planning to establish "the story."

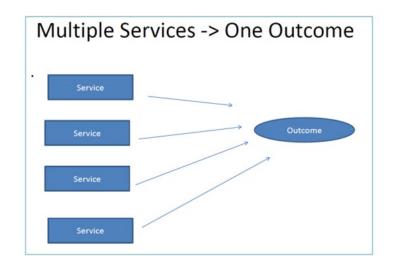
Service to Impact

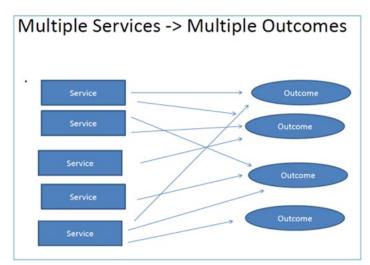
When we think of the impact of our programs, we need to know the possible relationships between the services that we provided and the outcomes that our customers have been able to achieve.





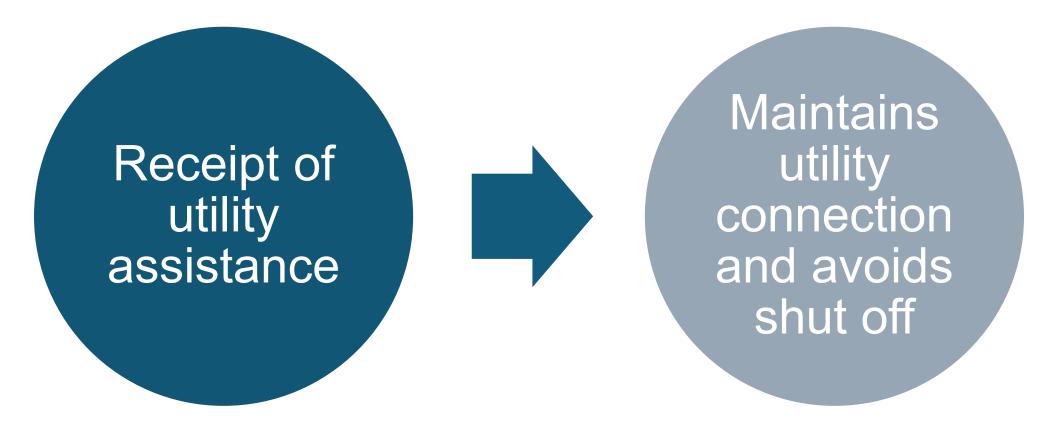






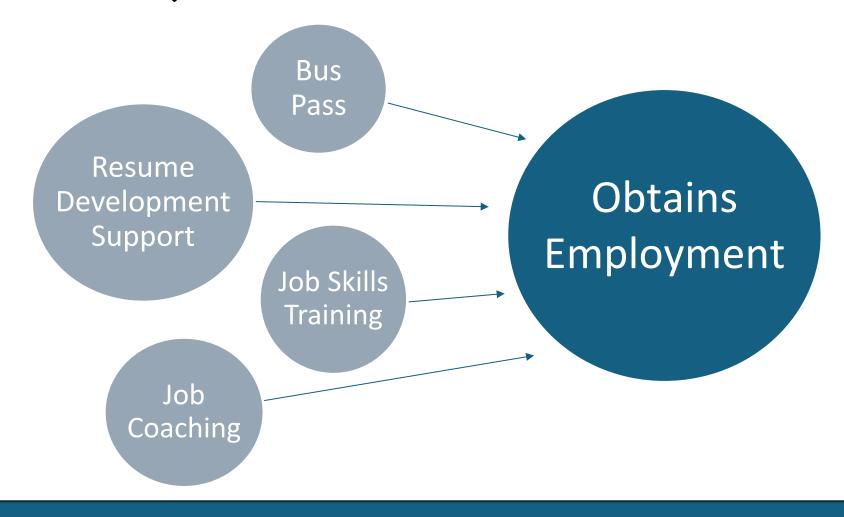


One Service - One Outcome



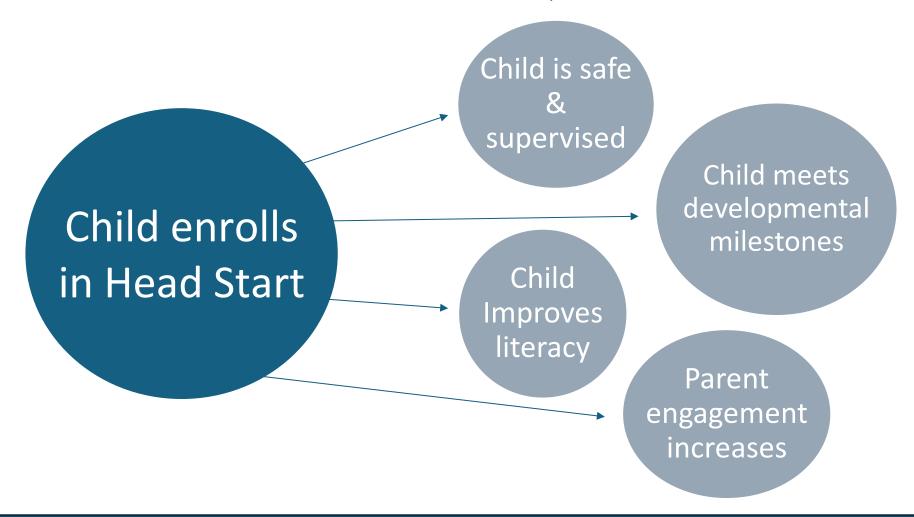


Multiple Services-One Outcome



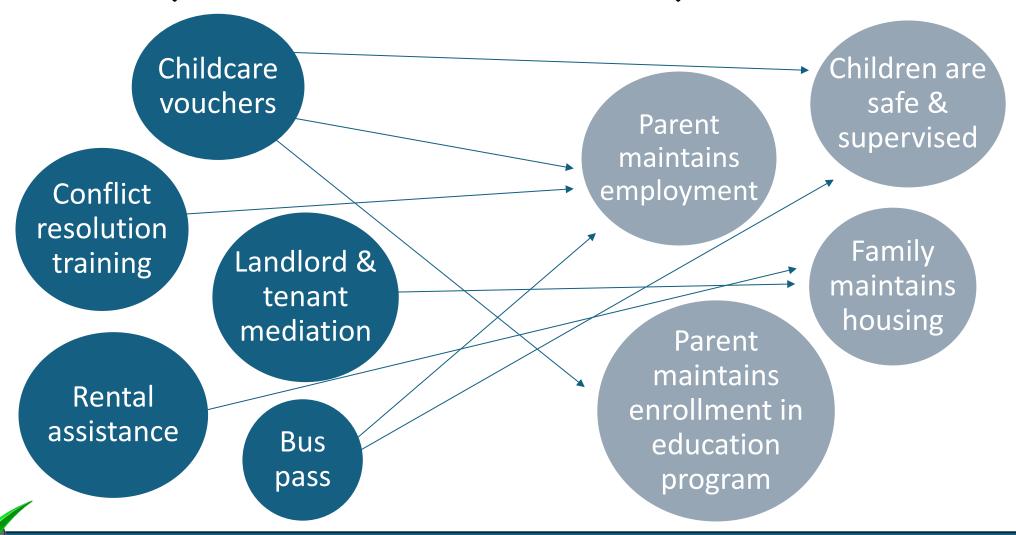


One Services-Multiple Outcome





Multiple Services-Multiple Outcome



When is a service a vital support but not expected to produce a change?

- Individuals receiving employment supplies for employment readiness or sustainment (e.g., uniforms, work boots, equipment).
- Individuals receiving school supplies and equipment.
- Individuals receiving hygiene kits or supplies (e.g.: hygiene kits, toothpaste, soap, deodorant, menstrual products).
- Individuals utilizing hygiene utilization services (e.g.: showers, toilets, sinks, laundry facilities).

 Services
- Individuals receiving clothing.



Same possibilities, different realities

We assume that the provision of services is what results in positive changes for the individuals, families, and communities that we serve.

But Services are not provided in a vacuum!

When we think about the realities that are possible -- based on the work of CAAs – we must also think broadly about the environment in which those services are provided.









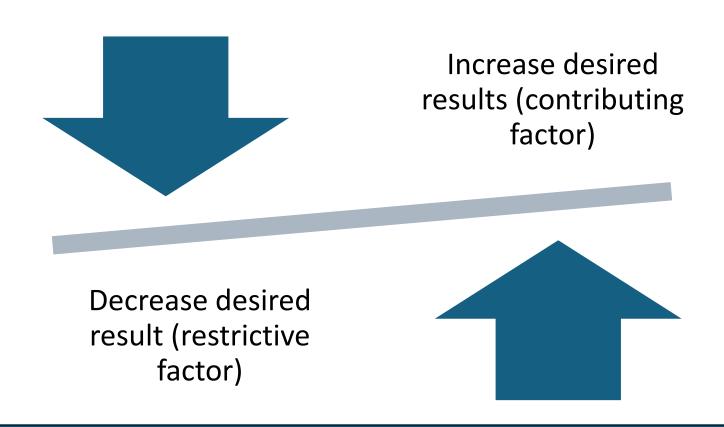
T-PEAAK Evaluation

Program evaluation typically assesses the achievement of a program's objectives and other aspects of performance in the context in which the program operates.

"Context" could include population served, geography of service location, etc.



This kind of analysis helps us to identify factors impacting delivery of services and outcomes



Factors at different levels

Agency level considerations:

- Staff years of experience, education, personality
- Facilities location, well-kept, accessible, sufficient size and fixtures
- Hours of operation

Family level considerations:

- Age
- Family type
- Language
- Neighborhood

Outcomes

Community level considerations:

- Supportive policies and practices
- Access to services and goods (food, medical, housing, work)
- Recreation opportunities





*PEAAK Knowledge

When the CSBG story is AVAILABLE to all, we must know what the story *means* so we can confidently talk about it to others outside the CSBG network.



Understanding How Actions Worked

Reach: Did you serve the population you targeted? Did partners help with your reach?

Scale: Did you impact a large enough portion of your demographic to make a difference?

Impact/Success Probability: How likely are you to achieve the same or better outcomes next year?

Community Fit: Did your work make sense in your community context?

Capacity: Do you have the organizational bandwidth and resources to implement the services and strategies in the same way next year? (Or in an improved way?)

This kind of analysis is part of the CSBG **Organizational Standards: Category Nine** Data and **Analysis**

Standard 9.3 – The organization's governing board and staff leadership have analyzed the agency's outcomes within at least the past 12 months and identified any necessary operational or strategic program adjustments and improvements.

When you don't see the expected achievement:





- What got in the way of success?
- Were there unexpected external influences?
- What if this setback is really an opportunity in disguise?
- What hasn't been achieved yet? Could it still be achieved given more time?
- How might we achieve the success we desire?

Do you strengthen? or abandon?



How do we know?



Assessing and Analyzing the Path from Possibility to Reality









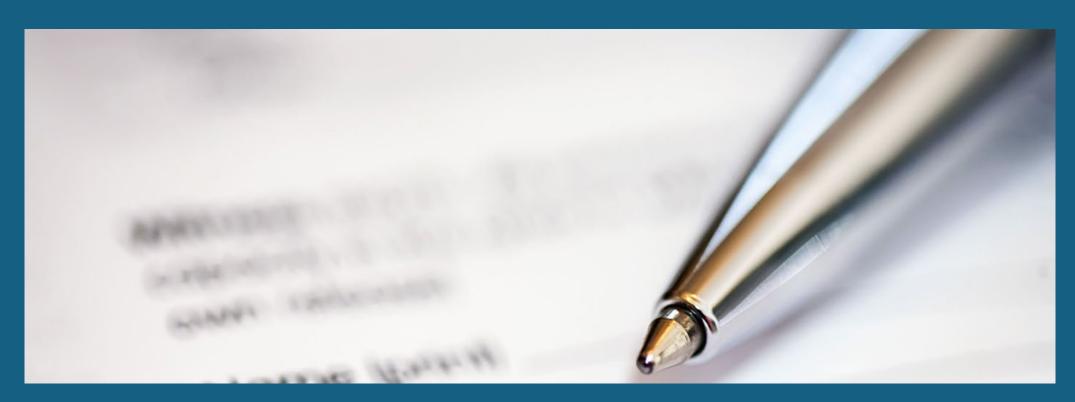
Process of Oversight of Programs

Agency's Facilities and Operations

Staff Capacity

Customer Satisfaction





Process for Oversight of Agency Programs



CSBG ORGANIZATIONAL STANDARDS CATEGORY NINE: Data and Analysis



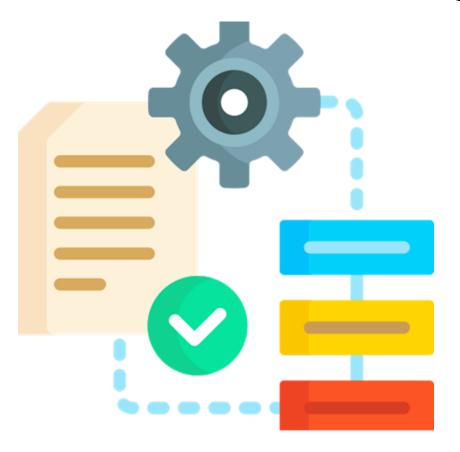
9.1 The organization has a system or systems in place to track and report client demographics and services customers receive.



9.2 The organization has a system or systems in place to track family, agency, or community outcomes



Oversight of Outputs



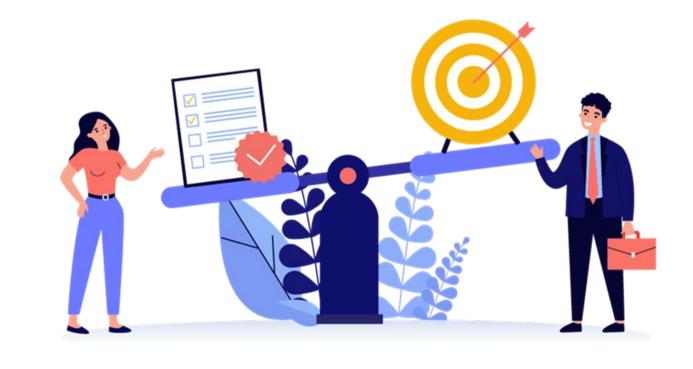
How is my program being implemented?

- Is it being implemented as we intended?
 Or have we modified it?
- Did we deliver the amount and type of service we projected?
- What do we know about how direct service staff coordinate services across different programs?

What is the experience of participants and staff as they experience a specific problem or program change?

Oversight of Outcomes

- What outcomes were achieved?
- For what population?
- Were the outcomes what we intended?
- Did we find any correlation between services, staff, and customer outcomes?





Process for oversight of service delivery		Agency Office
	X	There are processes in place for oversight of programs to evaluate the quality of service (such things as effectiveness and efficiency, quantity, frequency, duration).
	X	Implementation of services is guided by planning information (related to such things as How many people will be services? Who are they? What services do the get? What changes?).
	✓	There are MOUs in place for community level work
	✓	There is a process for using measurement tools as part of implementation to collect data related to both outcomes and outputs.
	Χ	Fiscal policies and procedures in place to assure funds are spent appropriately to support achievement of outcomes.
	Χ	There is a comparison between the demographics of the population served and the population identified to be in the CNA.
	✓	There is a comparison of projections and actual data.
	X	There is a process to show the connections among people, services, and outcomes. Identify those who have received single services, multiple, services, or bundled services.
	Χ	Recommendations for actions are made to the Board based on analysis of data.
	X	Services, strategies, and performance goals are adjusted as needed as evidenced by actual performance (i.e., they continue strategies that achieve desired performance goals and revise or discontinue strategies that do not achieve desired performance.)



What data will help determine if these elements are in place?



Agency Service Data

DATA

Number services per program

Number on waiting lists or unserved

Number of particular service provided

Number of referrals made

- Did we provide the services we projected?
 (The number and types of services?)
- Were we able to serve everyone who requested a service we had to offer?
- Does the data identify any systems or policy issues related to eligibility?
- Did people request services that we could not address? What were they? For what population?
- Do we know which customers received multiple services?

Agency Outcome Data

DATA

ANALYSIS

Number of NPIs reported

Documentation of how outcomes are verified

Profiles of customers who achieved outcomes

Profiles of customers who did not achieve outcomes

Customer feedback

- Did we achieve the outcomes we projected? (The number and types of NPIs reported?)
- Did people receive services that did not lead to a change in status, but met an immediate need?
- Did the service resolve or prevent a crisis? How do we know?
- Can you connect services and outcomes for each customer?
- Which services or set of services produced the most outcomes?
- Does qualitative data support quantitative data?

Demographic Data

DATA

Gender

Age

Race and ethnicity

Income

Employment

Family status

Immigration status

- Compare the population in need to those we have served.
- Are we serving our target population?
- Are there populations not achieving outcomes?

Agency Data from Prior Year

DATA

Number served per program

Number on waiting list or unserved

Gaps in services

Current or future program funding

Eligibility requirements or barriers

Cost per unit of services

Cost per unit of outcomes

- Did we provide the services we projected? (The number and types of services?)
- Did people request services that we could not address? What were they? For what population?
- Do we have an unduplicated count of our customers? Which customers received multiple services?
- Can you connect services and outcomes for each customer?
- What information can you get from the financial data?
- Does the data identify any systems or policy issues?

Fiscal Data

DATA

Total budget

Total expenditures

Budget vs Actual

Cashflow

Assets and Liabilities

- What does it cost per service? Per outcome?
 Compared cost by program?
- Are the services we invest in producing outcomes?
- Are we investing in the greatest area of need?
- Are resources allocated equitably across populations?

Oversight of Agency Expenditures, Capacity and Resources

CSBG Annual Report, Module 2







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

Data sources: General Ledgers, Expenditure Tracking, Program Tracking, Certification Tracking, Community Partner List





Agency Facilities and Operations



Impact of facilities on customer outcomes

A U.S. Department of Labor study found that poor facility cleanliness and quality were associated with an increased dissatisfaction rate among customers.

Even minor problems, like variations in custodial services, had a serious impact on customer retention and satisfaction.

The results highlight the potential impact poor facilities management, even when it does not cause immediate harm or injury, can have on customer experience.

https://entouchcontrols.com/insights/how-does-poor-facilities-management-affect-the-customer-experience/



Building facilities can

- Promote or negate access to services, both internal and external
- Create or reduce stress to employees and customers
- Support or impede customer retention





	Agency Office					
	✓	The office is located in an area where people with low income live.				
	X	The office is easy to access without a vehicle.				
ities	X	The office is open during times that meet the needs of the community.				
Facilities	X	The office is accessible to persons with disabilities.				
	✓	The office is welcoming.				
	X	The office has space that supports confidentiality.				
	X	The office is free of hazards (mold, leaks, etc.)				



Strong Communication Systems Can

- Support customers in quickly accessing information about programs and resources.
- Facilitate customers and agency staff staying in regular contact as needed.
- Ensure customers receive information and support regardless of language barriers.
- Contribute to efficient and effective service delivery.

Conversely, poor systems can create barriers to access and resources, create delays in service delivery, result in errors or misunderstandings, impact customer retention and staff morale.





Communication-Equipment and Processes		Agency Office			
	✓	There are enough computers to meet needs of staff.			
	X	Computers are available for customer use.			
	✓	Phone system is up to date and easy to navigate.			
	X	Recorded greeting are available in language(s) that match those spoken in the community.			
	✓	Signage in the office is written in language(s) that match those spoken in the community.			
	✓	Internet access is available.			
	X	There are communication channels to ensure information sharing among staff, customers, and stakeholders.			
	X	IT support is available for staff.			



What data will help determine if these elements are in place?



Accessibility

DATA

Census tract/zip code

Service area

Where clients live

Transportation routes

ANALYSIS

- Where are the geographic intersections of needs?
- Where are the customers and needs located?
- Are there issues with access to services in any area?
- Do services lie along transportations routes?

Facilities and Communication Data Sources

Facilities

- Building inspections
- HVAC, Plumbing, electrical and other maintenance reports
 - Accessibility evaluation

Communications

- IT service call log
- Broadband coverage map



Agency staff must be

- Informed,
- Assigned, and
- Equipped!





CSBG Organizational Standards CATEGORY SEVEN: Human Resource Management

- 7.1 The organization has written personnel policies that have been reviewed by an attorney and approved by the governing board within the past 5 years.
- 7.2 The organization makes available the employee handbook (or personnel policies in cases without a handbook) to all staff and notifies staff of any changes.
- 7.3 The organization has written job descriptions for all positions, which have been updated within the past 5 years.
- 7.6 The organization has a policy in place for regular written evaluation of employees
- 7.8 All staff participate in a new employee orientation within 60 days of hire. by their supervisors.
- 7.9 The organization conducts or makes available staff development or training (including ROMA) on an ongoing basis.

Informed

- Staff need to be clear about what the outcomes are and about the intended connections between services and outcomes.
- They need to know the focus of the evaluation activities is on improvement, not to be punitive or blaming if things are not working as well as expected.



Assigned

Each person involved needs to be clear on what their role is in data collection, analysis and evaluation.



Equipped



With critical thinking skills, with the ability to understand anomalies or errors in the data, with belief in evaluation as means of improvement!



		Agency Office			
ed and	✓	Staff are properly trained and equipped.			
J, Assign	X	Staff knows what is expected of them (properly informed and assigned).			
Informed Equipped	✓	Staff speaks the language(s) that match those spoken in the community.			
Staff Capacity-Informed, Assigned and Equipped	X	Staff are trauma informed.			
Staff	X	Human Resources policies and procedures are in place to provide supervision, evaluation and support to staff.			



What data will help determine if these elements are in place?



Human Resource Data

DATA

Staffing by program

Staff expertise and credentials

Staff satisfaction

Staff turnover

ANALYSIS

- Do certain levels of experience or credentials result in better outcomes?
- What level of staffing correlates with performance?
- What is the "sweet spot" for compensation to retain satisfied and high preforming staff?
- Do different department retain staff at a higher rate than others?

Data sources to 'prove' staff are informed, assigned and equipped

- Copies of departmental staff meeting minutes
- Copies of supervisory conference notes documenting performance expectations
- Copies of transcripts; Copies of certificates or credentials
- Copies of attendance logs documenting presence at staff meetings and trainings
- Copies of equipment inventory noting what equipment has been assigned to staff
- Copy of checklist of PPE distributed to each staff member
- Copy of employee handbook that contains dated policies and written procedures;
- Copies of performance appraisals



Customer Satisfaction



CSBG Organizational Standard 1.3

Private

The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.

Public

The department has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the tripartite board, which may be met through broader local government processes.

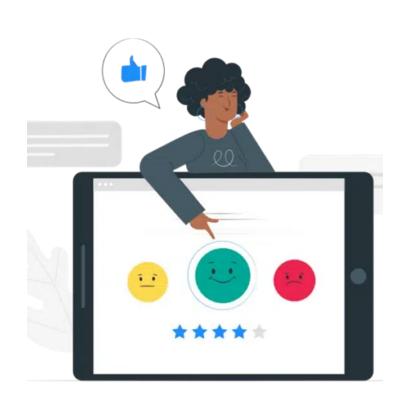


What could Customer Satisfaction Data tell us if we...

- Reviewed customer satisfaction of participants who received services versus those who did not?
- Compared customer satisfaction data between agency sites?
 - Paired with outcome data between sites?
- Compared Customer Satisfaction data by program?



Customer Satisfaction data can reveal agency level needs!



Depending on the agency's survey, data collected may include:

- Information on facilities
- Information on agency processes
- Information on staff interactions



		Agency Office				
Satisfaction	✓	There is a process in place to collect customer satisfaction data.				
Customer Sati	✓	There is a process in place to analyze customer satisfaction data.				
Custo	✓	There is a process in place to include customer satisfaction data in the Community Needs Assessment.				



What data will help determine if these elements are in place?



Customer Satisfaction Data Sources

- Quantitative and qualitative data from customer satisfaction surveys
- Community partner feedback
- Customer focus groups or listening sessions
- Staff surveys



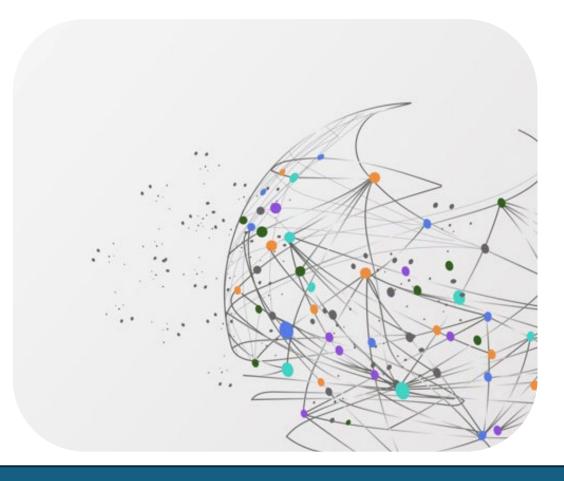
Other things to consider





CSBG ORGANIZATIONAL STANDARD 4.6

An organization-wide comprehensive risk assessment has been completed within the past 2 years and reported to the governing board.



Community Resources

Data

Employers and industries

Education (k-12, community colleges, four year colleges)

Healthcare (hospital systems, mental health)

Service providers (public, nonprofit, private)

Community based organizations

Philanthropy

ANALYSIS

- Possible partners for specific areas of need:
 - Workforce development opportunities
 - Adult education supports
 - Affordable housing units
 - Other
- Referral networks and processes
- Funders
- Community engagement opportunities for our customers

Identify Trends

DATA

Comparison with last year

Comparison with last three years

Comparison with other providers

ANALYSIS

- Increases and decreases in specific areas (population, requests, services, etc.)
- Changes in priority of needs
- Consider if you can predict potential changes in future needs
- Are the trends you are seeing similar to other providers in the community?





Program Description

- ABC's Self Sufficiency program provides comprehensive case management designed to support movement out of poverty.
- Services are provided to residents of Green and Smith Counties that are living below 200% of Federal Poverty Line and are currently unemployed or under-employed.
- Each county has its own office location and is staffed by Success Coaches, a Center Director, and a Receptionist.

Needs

Green	Smith
Individuals are unemployed. F	Individuals are unemployed. F
The county has limited number of employers that pay a living wage. C	Broadband service is not accessible to all county residents. C
Individuals lack financial literacy skills. F	Public transportation is available but does not run in rural parts of the county. C
There is no public transportation in the community. C	Individuals lack financial literacy skills. F



Outcomes and Services

Outcome: Individuals obtain living wage employment	Outcome: Individuals improve financial literacy skills
Job Readiness Training	Financial Capability Skill Training
Vocational Training	Financial Coaching or Counseling
Coaching	Financial Management Programs
Job Referrals	
Resume Development	
Interview Skills Training	
Employment Services	



Outcome Indicators

Outcome	Projected Customer Success	Actual Customer Success	Agency Targeting Success
Individuals obtain living wage employment	30/80 or 38%	25/75 or 33%	25/30=83%
Individuals improve financial literacy skills	60/80 or 75%	50/72 or 69%	50/60=83%



Outcome indicator by County

Outcome: Individuals improve financial literacy skills

Results	Projected Outcome Indicator	Actual Outcome Indicator	Agency Targeting Success
Program Total	60/80 or 75%	50/72 or 69%	50/60 or 83%
Green	38/50 or 76%	20/30 or 66%	20/38 or 53%
Smith	22/30 or 73%	30/42 or 71%	30/22 or 136%



Reassessment

- What questions does this analysis raise?
- How can you use the next community needs assessment to answer those questions?



Success is . . .







Next Steps



For more information



Barbara Mooney, Ed. D., NCRP Director, Association of Nationally Certified ROMA Professionals barbaramooney@windstream.net

Carey Gibson, MSW, NCRP, CCAP
Deputy Director, Association of
Nationally Certified ROMA Professionals
careylgibson@gmail.com

Please scan
here to
complete the
evaluation for
this session!







This publication was created by the National Association for State Community Services Programs in the performance of the U.S. Department of Health and Human Services, Administration for Children and Families, Office of Community Services, Award Number 90ET0506. Any opinion, findings, and conclusions, or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the U.S. Department of Health and Human Services, Administration for Children and Families. For more information, please visit the ACF website, <u>Administrative and National Policy Requirements</u>.