OUTCOME MEASUREMENT:  
From Theory to Implementation
Acknowledgement

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Introduction

Based on years working with the social sector—both small not-for-profits and government agencies—we have learned a great deal about implementing outcome measurement systems. We created this guide and are sharing it with you because of our belief that—according to the Chinese proverb—“give a man a fish, and you feed him for a day, but teach a man to fish, and you feed him for a lifetime.” Our hope is that in distributing this workbook, we can empower you to be self-sufficient when conducting outcome measurement in your organization.

Purpose

The content of this guide is designed to:

1. **Work within your organization’s unique culture.** Any organization can measure outcomes; it’s a matter of recognizing the pieces your company already has in place to support the process.

2. **Emphasize continuous quality improvement (CQI).** The journey is more important than the destination; the goal is to continuously improve the quality of your organization’s processes.

3. **Give you take-away tools.** From assessing your organization’s readiness, to describing your programs and measuring their outcomes, the practical tools in this workbook will make implementing outcome measurement a reality in your agency.

4. **Be interactive.** When you see the cartoon figure, Mr. PACE, use the space provided to take notes and apply the learning to your workplace.


Expected Learning Outcomes

After reading and completing this workbook, you will be able to:

1. Understand the definition and purpose of outcome measurement and how it can benefit your organization.

2. Perform a gap analysis using the McKinsey 7-S Framework.

3. Develop an outcome measurement team, plan, and schedule and choose the program for which you will identify and measure outcomes.

4. Create a logic model, or visual snapshot of your program.

5. Write program outcomes and their corresponding indicators.

6. Collect data to inform outcomes, analyze the data, and draw relevant conclusions about the quality of the program.

7. Report your outcome measurement results to others.

8. Leverage outcome measurement to improve organizational performance and create greater value within your organization.

What would you like to learn about outcome measurement? What information do you hope to take away? What are your learning objectives? Use the space below to answer these questions and create your learning plan before you proceed.
Measuring Program Outcomes—The Basics

What are outcomes?
An outcome describes a specific desired result.

What is outcome measurement?
Outcome measurement is the determination and evaluation of a program’s results, and their comparison with the intended or projected results.

This sounds familiar. How is outcome measurement different from program evaluation?
• Program evaluation is the process of collecting information about a program or some aspect of a program in order to make necessary decisions about the program. For more information on program evaluation, see “Evaluating Performance Outcomes: A Guide to Implementing Program Evaluations,” part of Brighter Strategies’ Training Series: People, Planning, Process, Performance.
• Outcome measurement, in comparison, is the part of program evaluation that focuses specifically on program results.

Measurement and evaluation are part of an even larger analysis of an organization’s performance, called strategic management.
Strategic management is the systematic analysis of external organizational factors—such as clients, stakeholders, and competitors—and the internal environment—employees, organizational systems, and processes—to achieve better alignment of organizational policies and procedures with strategic priorities.

Figure A: Levels of Organizational Performance Analysis

Figure A shows how outcome measurement is a component of program evaluation, which fits within a broader strategic management approach. Outcome measurement must be integrated within your organization’s larger systems and unique environment as follows:

Program needs and resources determine goals that are based on best practices, program fit, and organizational capacities. A program plan is then created, followed by evaluation during which outcome measurement is implemented, for the purpose of continuous quality improvement (CQI) and service sustainability.
Why should I care about outcome measurement?

• **Outcome measurement** is a valuable tool to ensure the success of programs in not-for-profit organizations:
  • Illustrates a program’s impact on participants and stakeholders
  • Provides regular feedback to help improve program services
  • Identifies what success in a program looks like and tracks to what extent that success is achieved
  • Many local governments, the United Way, and foundations often require that the programs they are funding show evidence of their value to participants and the community.
  • Many human service not-for-profits must comply with certain regulations and standards to justify their existence and prove the quality of their services.

Is outcome measurement right for me, right now?

Let’s face it, you’ve probably got plenty of other ways you could spend your—most likely limited—time and resources. If you answer “yes” to any of the following, you should consider implementing outcome measurement in your organization now:

- **Yes** □ **No** There are decreasing funds for not-for-profits in my community.
- **Yes** □ **No** There are increasing community needs that my organization can meet.
- **Yes** □ **No** There is a substantial focus on whether or not organizations like mine really make a difference.
- **Yes** □ **No** My organization currently evaluates (or previously evaluated) programs for measures that are not true outcomes (that is, they do not assess impact on clients).

Keep in mind that outcome measurement cannot be successful anywhere. It requires certain prerequisites for optimum effectiveness, including:

• **Leadership support from the top**—stakeholders must see that senior leaders are behind outcome measurement efforts
• **Commitment of time and staff resources**—these commitments are much greater initially and gradually decrease as outcome measurement becomes part of your broader CQI systems
• **Program and organizational stability**—do not begin outcome measurement implementation if your organization is undergoing a major reorganization or staffing change
• **Technological capability**—basic technology is necessary to track data and prepare reports

Don’t allow incorrect assumptions about outcome measurement to scare you away. Keep reading this guide to debunk the following widely-held outcome measurement myths:

• Evaluation is a complex science, and I don’t have time to learn it.
• Outcome measurement is a one-time event, and then I’m done.
• I can implement a strong outcome measurement system in a few days.
• Evaluation is a whole new set of activities that we don’t have the resources to support.
• There is one “right” way to do an outcome evaluation, and I’m going to learn it today.
• Funders (or other stakeholders) will reject my outcome measurement plan.
• I know what my clients need, so I don’t need outcome measurement to tell me if I’m meeting their needs.
• Program staff is fully responsible for the outcomes reported, whether positive or negative.
Why do you intend to use outcome measurement in your organization?
Choose a purpose(s) from the previous page, or create your own:
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Do you think you’re ready to measure outcomes in your organization right now?
Why or why not?
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Do you have any preconceived ideas about or expectations for outcome measurement?
Record them here, so you can see how the actual process measures up in the end!
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Measuring Program Outcomes—The Process

Outcome measurement includes specific actionable steps. The following elements of the outcome measurement process will be described in detail throughout this guide:
1. Assess your organization’s readiness. (Use the McKinsey 7-S Framework as a tool.)
2. Select the program and create a plan.
3. Describe the program’s mission and activities. (Use a logic model as a tool.)
4. Identify the program’s intended results, or outcomes.
5. Identify indicators of success for each outcome.
6. Determine appropriate data collection processes, and collect data.
7. Analyze data to better understand program achievements.
9. Use the findings and take action to improve the quality of the program.

Figure B: Outcome Measurement Process
Tips for Developing Your Outcome Measurement Strategy

- **Measure what you can, and measure what you should.** Keep the process simple and relevant to your organization’s capacities and your program’s needs.

- **Plan the evaluation process while planning the program, if possible.** Aim to incorporate both of these elements into your organization’s strategic planning process.

- **Consult the standards.** Use tested, tried-and-true methods to implement your strategy, such as McKinsey’s 7-S Framework (see Step 1) or a logic model (see Step 3).

- **Find an expert.** Develop partnerships with subject matter experts or colleagues who have implemented outcome measurement in their organizations.

- **Take a before picture of your program.** This allows for a point of comparison and ensures progress is tracked over time.

- **Plan a cycle of refinement.** Continuous quality improvement is the overarching purpose of outcome measurement.

A 2007 study by the Joint Center for Housing Studies of Harvard University reported the following findings of a survey of local United Way (UW) outcome measurement programs and Success Measures (SM) programs:

Five users of UW systems were asked whether they would perform outcome measurement, even if it were not required by their funders. All five answered a resounding “yes.”

Respondents to surveys and interviews affirmed overwhelmingly that outcome measurement systems have been beneficial, on the whole.

Of the 15 directors interviewed for the SM Survey, five noted they are already using the results of their outcome evaluations, and all 15 respondents expected their findings to help shape programming, business planning, budgeting, and fundraising.
Step 1: Assess Your Organization

Introducing the McKinsey 7-S Framework

The McKinsey 7-S framework reflected a new way of thinking about organizational effectiveness when it was introduced in the late 1970s: It shifted the focus of strategic management from structure to coordination. The framework takes into consideration the complexity of organizations, showing how one can holistically and effectively organize a company. It suggests that all areas of an organization are interconnected and must work together in order for progress to occur in any one area, or within the organization as a whole.

The McKinsey 7-S framework is comprised of three hard elements, three soft elements, and one center element. The diagram below illustrates the interdependency of the seven elements, and how a change in one (either positive or negative) affects each of the others.

*Figure C: The McKinsey 7-S Framework*

![Diagram of the McKinsey 7-S Framework]

**Hard elements** are easier to identify or define and can be directly influenced by management.

1. **Strategy**: Plans for the allocation of resources, over time, to reach identified goals  
   *Example: environment, competition, clients, stakeholders*

2. **Structure**: The way the organization’s units relate to each other  
   *Example: centralized divisions or a decentralized structure*

3. **Systems**: The processes and activities staff engage in that characterize how important work is to be done  
   *Example: financial systems, performance evaluation, information systems*

**Soft elements** are not as easy to describe, less tangible, and more influenced by culture than management.

4. **Skills**: Distinctive capabilities of staff or the organization as a whole  
   *Example: the organization’s core competencies*

5. **Staff**: Numbers and types of personnel and their general capabilities  
   *Example: 10 executives at the C-level*
6. **Style**: Cultural style of the organization and how managers behave in achieving the goals
   *Example: the organization is managed predominantly by a command-and-control leadership style*

The **center element** is also considered a soft element, but is the point of interconnection for and central to the development of the remaining elements.

7. **Shared Values**: What the organization stands for and believes in as evidenced by the corporate culture and work ethic
   *Example: integrity, smart work, corporate sustainability*

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**Figure D: Your 7-S Elements**

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*Below, identify the 7-S elements in your organization.*

<table>
<thead>
<tr>
<th>HARD ELEMENTS</th>
<th>SOFT ELEMENTS</th>
<th>CENTER ELEMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy</td>
<td>Skills</td>
<td>Shared Values</td>
</tr>
<tr>
<td>Structure</td>
<td>Staff</td>
<td></td>
</tr>
<tr>
<td>Systems</td>
<td>Style</td>
<td></td>
</tr>
</tbody>
</table>
Using the Framework

At this point, you may be thinking, “That’s a well-organized model, and I love the alliteration, but so what? And what does this have to do with outcome measurement?”

The McKinsey 7-S framework can help you to

- understand how your organization’s elements are interrelated
- identify what needs to be realigned to improve performance in your organization
- maintain alignment and performance during organizational change.

Getting acquainted with the McKinsey 7-S framework and its focus on the interconnectedness of your organization’s systems is helpful before evaluating program outcomes:

- This model emphasizes that measurement does not take place in a vacuum, but is directly related to, and affects all other organization processes (see Figure A).
- You can use this model to conduct an organization-wide gap analysis (below), a comparison of your program’s actual performance with its potential performance; it is essential to know where your organization is now before conducting outcome measurement to determine where you want to be.

The following questions are intended to take you through a gap analysis using the McKinsey 7-S framework. These questions help you to identify where you are now (Point A) and visualize where you want to be (Point B). Use them in conjunction with Figure E.

**Strategy**
- What is our strategy?
- How do we intend to achieve our objectives?
- How do we deal with competitive pressure?
- How do we deal with changes in customer demands?
- How is strategy adjusted for environmental issues?

**Structure**
- How is the company divided?
- What is the hierarchy?
- How do the various departments coordinate activities?
- How do employees organize and align themselves?
- Is decision making centralized or decentralized? Is this as it should be, given what we’re doing?
- Where are the lines of communication—both explicit and implicit?

**Systems**
- What are the main systems that run the organization? (Consider financial and HR systems as well as communications and document storage.)
- Where are the controls and how are they monitored and evaluated?
- What internal rules and processes do employees use to stay on track?
Skills
- What are the strongest skills represented within the company?
- Are there any skills gaps?
- What is the company known for doing well?
- Do the current employees have the ability to do the job?
- How are skills monitored and assessed?

Staff
- What positions or specializations are represented within the organization?
- What positions need to be filled?
- Are there gaps in required competencies?

Style
- How participative is the management’s leadership style?
- How effective is that leadership?
- Do employees tend to be competitive or cooperative?
- Are there real teams functioning within the organization or are there just nominal groups?

Shared values
- What are the organization’s core values?
- What is the corporate culture?
- How strong are the values?
- What are the fundamental values that the company was built on?

Figure E: 7-S Gap Analysis

Look at the seven elements you identified in Figure D. Using the questions above, use one color or symbol to mark the quality of each element within your organization, using a scale of 1 to 5, with 1 being “suffering” and 5 being “thriving.” This mark will designate “Point A.”

*After you complete the outcome measurement process in this workbook, revisit this chart and reanalyze each element, using a different color or symbol. This second mark will designate “Point B.” It will be exciting to watch your organization change and grow as a result of the following outcome measurement process.
Now, ask yourself the following questions to determine what you can do to move each element closer to a “5.”

**Start with your shared values:** Are they consistent with your structure, strategy, and systems? If not, what needs to change?

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**Then look at the hard elements:** How well does each one support the others? Identify where changes need to be made.

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Step 2: Make a Plan

Now that you’ve looked at your organization as a whole, identified how its systems relate to one another, and analyzed some of its performance needs and opportunities for improvement, you must hone in on the specific program for which you plan to measure outcomes.

Select the program
What constitutes a “program” looks very different from one organization to another. One organization may have dozens of programs with various teams of staff assigned to manage each one; another organization may have one or two staff persons operating its sole program. Either way, a program can be defined as a set of activities with a defined objective.

When selecting a program for outcome measurement:
• Think about program alignment and where an outcome measurement system fits into a program (see the 7-S framework in Step 1)
• If your organization has more than one department or team providing the same service, you can use the same measurement system for each group; however, each separate program needs its own system
• Don’t be afraid to start small; it’s okay to begin by measuring one program, instead of every program

Select participants
Establish a team that will manage the outcome measurement process. Ideally, this team should include:
• Program manager
• Members of program staff
• Representatives from at least one other program in the organization
• Representatives of the organization’s senior leadership, to provide overall organizational perspective
• Program participants, if possible (or, hold a focus group at this point in the process to gather feedback from participants)

*Another option is to use an internal measurement “guru” (someone in the organization who has studied or implemented outcome measurement before) or to hire an external consultant; however, the team should still include program managers and staff.

Treat your work as a vital initiative that will add real value to your organization’s mission. Be sure to have fun with the process! Some ideas:
• Brand your outcome measurement process with its own name and mission statement
• Make T-shirts or notebooks for each member of the team
• Pick a unique location away from your workplace for regular team meetings

Set a schedule
Set a realistic schedule for the outcome measurement process, keeping in mind the staff and financial resources available to you. Create a detailed timeline of what you plan to accomplish over a two-year span, including the dates when the team will meet.
Who will you invite to join your outcome measurement team?

In what unique ways can you make the outcome measurement process enjoyable and engaging for all team members?
Step 3: Describe the Program

Identify the mission and clients

Most likely your organization has a mission statement. Does the program you chose to measure have its own mission? If not, it’s time to create one.

A program mission statement is typically written in the following format:

To... (list basic objectives the program seeks, as well as any major negative consequences the program should avoid) by... (describe the service that is provided to achieve these objectives).

For example:
“To increase job skills, social interaction, and inclusion for adults with disabilities by training them to work alongside their peers and among the general public in local businesses.”

“To equip our employees and decrease the organization’s skills gaps by providing effective career development and professional training opportunities.”

“To serve the basic physical needs and decrease the mortality rate of the homeless people in our community by providing a wholesome meal and warm bed daily for all who seek food and shelter.”

Now, write the mission statement for your program. Include specific program objectives and identify the people your program serves:

Create a logic model

It’s time to describe in detail how your program operates, so you can then identify its desired results, or outcomes.

A logic model displays the sequence of actions that describes what the program does and how investments link to results. It is a
• systematic and visual way of presenting relationships
• framework that helps organize information
• tool used to evaluate programs
A logic model implies an “if... then...” sequence:
- If prevention programs are targeted at multiple locations (school, community, and family), then they are more likely to produce results.
- If alcohol, tobacco, and drugs are difficult for youth to obtain, then youth are less likely to use them.
- If the homeless individuals in our community have hot food and warm shelter options available to them, then they are less likely to spend winter nights on the streets, hungry and cold.

Draft your own “if...then...” statement that explains what need your program exists to fulfill.

A basic logic model looks like this:

<table>
<thead>
<tr>
<th>Needs</th>
<th>Inputs</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Short</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Intermediate</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Long</td>
</tr>
</tbody>
</table>

A logic model contains the following elements:

1. Need: The reason a program exists
   
   Example: This training exists in order to teach participants how to implement outcome measurement systems in their organizations.

   *Consult your program’s mission above; the need statement should be very similar to, if not the same as, your program’s mission.
2. **Inputs**: Resources used to meet the program’s need  
   Examples: money, time, facilitator, materials, equipment

3. **Activities**: What happens on a daily basis that comprises the work of the program  
   Example: reading, discussion, completing exercises in the workbook

4. **Outputs**: Direct and tangible products of the program’s activities; have little inherent value to the program  
   Example: number of participants to finish the training, number of workbooks completed

*When identifying activities and outputs, be as specific or as general as you think is appropriate for your environment.

For example, your program may provide therapeutic services (general); which include speech therapy, physical therapy, and occupational therapy (more specific); which include touch talker training (very specific).

**Identifying Activities and Outputs**

Below, describe your program’s activities and outputs both generally and specifically.

<table>
<thead>
<tr>
<th>General</th>
<th>Specific</th>
<th>Detailed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Outputs</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Outcomes vs. Outputs**

<table>
<thead>
<tr>
<th>Outcomes</th>
<th>Outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicate program effectiveness</td>
<td>Indicate program efficiency</td>
</tr>
<tr>
<td>Change in knowledge, skills, attitude or behavior</td>
<td>Program units of service produced</td>
</tr>
<tr>
<td>Stakeholders’ experiences/benefits as a result of the program</td>
<td>Tangible value produced as a result of the program</td>
</tr>
<tr>
<td>Examples: skills gained from attending a training class, changes in participant behavior, changes in attitude</td>
<td>Example: number of people who attended a training class, number of classes held, number of volunteer hours served</td>
</tr>
</tbody>
</table>
5. **Outcomes**: benefits or changes for individuals as a result of participation in the program; improvement in behavior, skill, knowledge, or attitude

- **Short**: What you expect to see

  Example: *Participants will finish the training with a better understanding of outcome measurement systems.*

- **Intermediate**: What you want to see

  Example: *Participants will take the knowledge they have gained from the training to implement outcome measurement systems in their organizations.*

- **Long-term**: What you hope to see

  Example: *Participants’ implementation of outcome measurement systems will have a positive impact on their programs specifically and their organizations overall.*

### Sample Logic Model

The logic model below shows a snapshot of a community shelter that provides homeless individuals with evening meals, warm beds, and connections to local vocational and job services.
Now, build a logic model of your program. Don’t worry about creating the “perfect” logic model. Remember, you’re the expert on your program!

<table>
<thead>
<tr>
<th>Needs</th>
<th>Inputs</th>
<th>Activities</th>
<th>Outputs</th>
<th>Short</th>
<th>Intermediate</th>
<th>Long</th>
</tr>
</thead>
</table>
Step 4: Identify Program Outcomes

As explained in Step 3, program outcomes show improvement, progress, or change in the knowledge, attitudes, skills, and behaviors of program participants.

- **Knowledge**: what participants learn as a result of your program
- **Skill**: the development of new skill sets or the improvement of skill sets over time as a result of your program
- **Attitude**: how participants’ perceptions or feelings about a topic change as a result of a program
- **Behavior**: change in participants’ actions as a result of a program

When writing outcomes, brainstorm the following among your team:
- What are you trying to accomplish through the program?
- What are the desired results you expect from the program?
- How would you like conditions to change as a result of the program?
- What is the benefit to the program participants?

When writing outcomes, seek the following from stakeholders:
- Examine outcomes used by similar programs
- Talk to program staff (who are not part of your outcome measurement team)
- Hold focus groups with program participants, and ask:
  - What has changed in their lives because of the program?
  - What do they not like about the services?
Step 5: Identify Outcome Indicators

After you define your program outcomes generally, you must identify specific indicators that will be measured and tracked over time.

- An indicator measures specific data that track a program’s success on outcomes by describing observable, measurable characteristics or changes that represent achievement of an outcome.
- Because indicators show units of measurement, they should begin with, “The number of...” or “The percent of...”
- Every indicator should have a corresponding target, or the number that the outcome is aiming to reach.

Example:
- **Outcome:** Participants will finish the training with a better understanding of outcome measurement systems.
- **Indicator:** The percent of total participants who will increase their understanding of outcome measurement, based on written satisfaction surveys
- **Target:** 100 percent

Use Mr. PACE as a mnemonic to help you to create outcomes anytime, anywhere:

% (and #) of people (who) + will + action verb (change in behavior, skill, knowledge, or attitude) + change (by how much) + extent/time (when)

**PACE**
People (who), Action (what), Change (how much), Extent (when)

Example: 50 percent of students (people) using homework assistance services will increase their grade point average (action) one point (change) by the end of the semester (extent).

Example: The percent of homeless people in our community (who) who do not have access to hot meals and warm beds (what) will decrease 25 percent (how much) by March 31 (when).
Now it’s your turn. Create your own examples (with help from Mr. PACE) of possible program outcomes and their corresponding indicators and targets using the chart below.

### Outcome Measures Chart A

<table>
<thead>
<tr>
<th>Outcome Statement</th>
<th>Outcome Statement</th>
<th>Outcome Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indicator</td>
<td>Target</td>
<td>Indicator</td>
</tr>
</tbody>
</table>

Additional considerations:
- Have at least one indicator for each outcome
- Write the shortest outcome possible (be concise)
- Pilot test your outcomes to ensure they are realistic for your program
- When developing short-term outcomes, ask yourself three questions:
  - Can the program influence the outcomes in a non-trivial way, even if we can’t control them?
  - Does measuring our outcomes help us to identify programmatic success or pinpoint areas of need?
  - Will stakeholders accept the outcome as a valid representation of the program?
Complete the chart above, using the outcomes you drafted with Mr. PACE’s help. Then, ensure you can answer each question in the affirmative. If you cannot, redraft your outcome or create a new one that satisfies each of the questions.
Step 6: Collect Data

Data collection can often be the most time-consuming part of the outcome measurement process, but it’s also the most vital. The data you gather fulfills each indicator you wrote in Step 5. It is also a point by which you will track progress on outcomes over time.

The following are potential sources for data collection:
- Organization records
- Stakeholder surveys
- Objective observation of participants
- Focus groups
- Interviews

Data Sources

<table>
<thead>
<tr>
<th>Source</th>
<th>Benefits</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Observation: viewing and noting a</td>
<td>- Provides detailed data</td>
<td>- Observer bias may occur</td>
</tr>
<tr>
<td>fact or occurrence</td>
<td>- Reliable because data collection is occurring “live”</td>
<td>- Confidentiality or privacy issues may arise</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Written survey: a sampling of facts</td>
<td>- Anonymous</td>
<td>- Impersonal</td>
</tr>
<tr>
<td>or opinions used to indicate those</td>
<td>- Inexpensive to administer</td>
<td>- May need statistical program/expert to analyze</td>
</tr>
<tr>
<td>of a complete collection or larger</td>
<td>- Can reach a broad audience</td>
<td>results</td>
</tr>
<tr>
<td>unit</td>
<td></td>
<td>- Participants may misunderstand questions</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Checklist: a list of items used for</td>
<td></td>
<td></td>
</tr>
<tr>
<td>comparison or verification</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>One-on-one interview: one person</td>
<td>- Allows for personal connection</td>
<td>- Time consuming</td>
</tr>
<tr>
<td>questions, consults, or evaluates</td>
<td>- Inexpensive to administer</td>
<td>- Limited audience</td>
</tr>
<tr>
<td>another from whom information is</td>
<td>- Provides thorough data</td>
<td>- Difficult to compare with other data</td>
</tr>
<tr>
<td>sought</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Focus group: a representative group</td>
<td>- Time efficient</td>
<td>- Difficult to administer</td>
</tr>
<tr>
<td>of people questioned together about</td>
<td>- Collects thorough, varied feedback</td>
<td>(requires facilitation)</td>
</tr>
<tr>
<td>their opinions on a particular</td>
<td></td>
<td>- Difficult to compare data</td>
</tr>
<tr>
<td>subject</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Case study: study of a unit (such</td>
<td>- Provides insight into program</td>
<td>- Time consuming</td>
</tr>
<tr>
<td>as a person or group) in order to</td>
<td>as a whole</td>
<td>- Lacks breadth of data</td>
</tr>
<tr>
<td>compare to a larger group</td>
<td>- Garners excellent descriptive data</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Documentation review: study of</td>
<td>- Allows examination of data over time</td>
<td>- Time consuming</td>
</tr>
<tr>
<td>documents to substantiate a claim</td>
<td>- Unbiased</td>
<td>- Data may be incomplete or vague</td>
</tr>
<tr>
<td></td>
<td>- Inexpensive</td>
<td>- Confined to existing data</td>
</tr>
</tbody>
</table>
Establish a data-collection team
- Identify the roles for each committee member (for example, gathering data, developing survey questions, running focus groups, analyzing data, and facilitating priority-setting sessions)
- Document how key stakeholders are involved in the assessment process
- Document how diverse and hard-to-reach populations are involved

Examine current data
- Contact state and local agencies
- Review industry-related research
- Review organizational data (such as strategy, performance metrics, and satisfaction surveys)

Determine other data needs
- What are the major problems in your targeted area or population?
- How important are these issues to different sectors of the community?
- What other resources are there in your community to address these needs?

Develop a data-collection plan
- Get stakeholders invested by explaining how the data will be used
- Invite people from other organizations who may be helpful in obtaining data to join your group
- Focus on both informal (for example, one-on-one conversations) and formal (for example, surveys and focus groups) data-collection channels
- Gather both qualitative and quantitative data
- Pilot test any new data-collection methods, such as written surveys
- Establish a step-by-step data-collection timeline
- Offer to share your findings with your data-collection partners

Implementing the plan
- Stay true to the data-collection plan
- Stay true to the established timeline
- Collect data you will use, and use what you collect
- Be a good partner—share data if you promised to do so

Tips to Ensure Your Data is Reliable
- Keep records up to date
- Enter program data directly onto the computer; skip paper when you can
- Develop clear and complete definitions and instructions to ensure data is captured properly
- When faced with conflicting information between archival data and more subjective data, lean toward the subjective data; archival data has a longer lag time
- Ask a lot of “why questions” when looking at data—results are not always related or causal
- Combine many data sources for a richer picture
**Qualitative vs. Quantitative Data**

<table>
<thead>
<tr>
<th>Qualitative Data</th>
<th>Quantitative Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deals with descriptions</td>
<td>Deals with numbers and definitions</td>
</tr>
<tr>
<td>Data can be observed</td>
<td>Data can be measured</td>
</tr>
<tr>
<td>“Soft” data</td>
<td>“Hard” data</td>
</tr>
</tbody>
</table>

**Data Log**

*Use the chart below to recording general observations and findings from each of your data sources.*

<table>
<thead>
<tr>
<th>Archival Data (Documentation)</th>
<th>Observation</th>
<th>Surveys</th>
<th>Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus groups</td>
<td>Case studies</td>
<td>Other</td>
<td>Other</td>
</tr>
</tbody>
</table>
Step 7: Analyze Data

The most difficult part is finished; now you must interpret what the data is saying about your outcomes.

The outcome data should be totaled for the program as a whole, as well as organized per specific participant groups, as appropriate. This helps you to easily identify any major differences in data according to:

- Gender
- Age group
- Race/ethnicity
- Location of service
- Key characteristics of service

When analyzing quantitative data:

- Tabulate the information (add up the ratings, rankings, “yes’s”, and “no’s” for each question)
- For ratings and rankings, consider computing a mean, or average, for each question
- Consider conveying the range of answers (for example, 20 people ranked “1”, 30 ranked “2”, and 20 people ranked “3”)

When analyzing qualitative data:

- Organize comments into similar categories such as concerns, suggestions, strengths, and so forth
- Label the categories or themes
- Attempt to identify patterns, associations, and causal relationships in the themes

Complete the following steps to make the most of your outcome data analysis:

- Compare data to established targets for each indicator
- Compare data to local, state, or national benchmarks, as appropriate
- Compare most recent data to that of the previous reporting period (if this is not your first round of data-collection)
- Look for data trends, such as
  - Time trends
  - Differences between major categories of clients (by demographic)
  - Differences between similar programs within an agency
  - Differences between similar organizations in the community
- Identify key values that appear to represent unusually positive or negative outcomes
- Make inferences and draw conclusions by looking at multiple data points, rather than focusing too heavily on single data points
Step 8: Report Findings

Presentation is critical in making the information you gathered useful. Reports should be clear, understandable, and meaningful. The scope of information included in the report depends on to whom you are reporting (for example, funders, senior leaders, or program staff).

When crafting reports:
- Use the logic model you created in Step 3 and the outcome chart you created in Step 5 to report the process
- Selectively use charts, tables, and graphs to report your data-collection results and show your analysis
- Avoid data overload
- Clearly define each outcome, indicator, the results, and explanatory information to enhance readers’ understanding
- Provide explanations for disappointing outcomes or those that were exceptionally good

When sharing reports:
- Prepare ongoing progress reports for internal use during the duration of outcome measurement
- Share the final report with program staff before distributing it to external stakeholders
- Promote accountability by reporting outcomes to program participants, stakeholders, funders, and the community
- Print report highlights in the organization’s annual report
- Disseminate the report via the company website or other electronic media

Sample Evaluation Report Template

- Title page (name of the organization, name of the program, and date)
- Table of contents
- Executive summary (one-page, concise overview of findings and recommendations)
- Describe the outcome measurement plan, including
  - Purpose
  - Who was involved
  - Timeline of measurement activities
- Provide an overview of the program being evaluated
  - History
  - Mission/Goals
  - Staff
  - Funding
  - Participant demographics
- Summarize each of the program’s elements
  - Needs
  - Inputs
  - Activities
  - Outputs
- List identified outcomes, indicators, and targets
- Describe data collection methodology
  - Types of data collected
  - Processes used to collect data
  - Processes used to analyze data
  - Data collection limitations
- Summarize findings from data analysis, including interpretations and caveats
- List recommendations
  - Decisions that must be made about program
  - Immediate focus needs
  - Outcome measurement process revisions for the future
- Include possible appendices
  - Organization/program assessment results, such as completed 7-S framework analysis
  - Logic model
  - Chart of outcomes and indicators
  - Data summaries (for example, in tabular format, charts, case studies, etc.)
Step 9: Take Action

The final stage of outcome measurement involves using all that you have done up until this moment to achieve the process’s initial goal: improve the program! You can use the results of your process for any or all of the following:

- Identify where improvements are needed
- Form small working groups to examine the reasons for unusual outcome results
- Hold “How are we doing?” meetings with the program manager and staff to brainstorm possible program modifications that may help achieve better outcomes
- Determine how effectively any implemented program modifications improved services
- Identify high-performing program staff and recognize or reward them
- Improve fundraising and community relations by disseminating the report you crafted in Step 8

Develop and implement action plans aimed at resolving problems indicated by outcome measurement. Below is an example of an action planning template.

Action Planning Chart

<table>
<thead>
<tr>
<th>Outcome</th>
<th>Objective</th>
<th>Actions</th>
<th>Responsibility</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>50 percent of students using homework assistance services will increase their grade point average one point by the end of the semester</td>
<td>Grow the team of volunteer adults committed to tutoring students</td>
<td>Advertise need for tutors on local education message boards Send letters home with parents to solicit volunteer help Post volunteer positions at local colleges</td>
<td>John Smith and his two current volunteer tutors</td>
<td>March 31, 2011</td>
</tr>
</tbody>
</table>

Use the empty space above to create your own example of an action planning item.
Concluding Thoughts: Time to Walk the Talk

You did it! You have successfully completed your first short-term outcome of this workbook: to gain new knowledge about how to implement an outcome measurement system in your organization. Congratulations!

Take some time now to briefly revisit Mr. PACE where he appears throughout this workbook, and review the activities you completed along the way. Below, write the next steps you will take to begin using what you have learned in your organization, starting today.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

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________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
OUTCOME MEASUREMENT: From Theory to Implementation

TRAINING SERIES: PEOPLE • PLANNING • PROCESS • PERFORMANCE

Brighter Strategies
Better process Brighter results

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