



How to Develop Metrics that Matter

From Theory of Change to Dashboards.

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United Way
of Massachusetts Bay
and Merrimack Valley

Theory of Change

- What are you trying to accomplish?
- What do you need to do to affect the desired change?
- Is this based on evidence, a hypothesis, or a wild guess?
- Know the difference between meaningless data, meaningful information and actionable knowledge.
- Complete your theory of change...
- If you do _____, then _____ will happen.

Logic Model

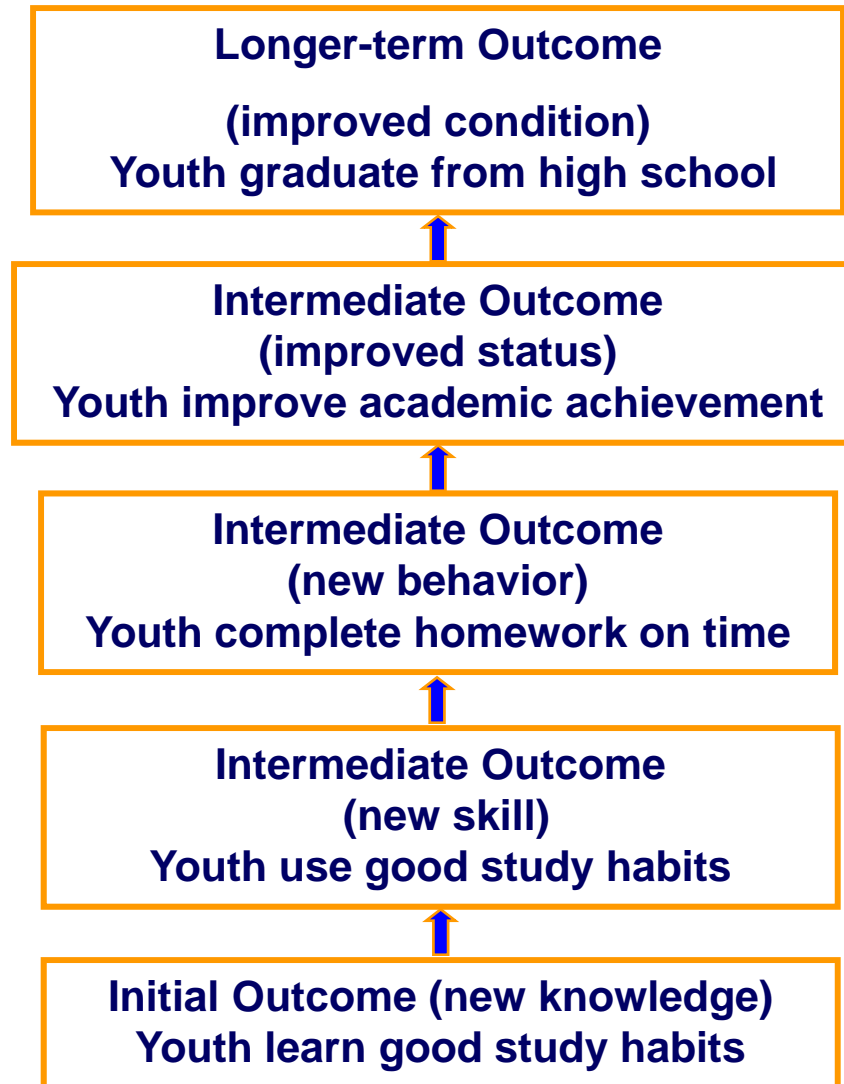
Inputs	Activities	Outputs	Outcomes
Resources	Activities in programs	# of activities	Benefits to participants
Money Staff Volunteers Equipment Supplies	Shelter Training Education Counselling Mentoring Organizing	# of classes taught # of counselling sessions # of books distributed # of hours of service # of participants # of leaflets distributed # of action plans developed	New knowledge Increased skills Changed attitudes Modified behaviour Improved condition Altered status

The “If / Then” Outcome Sequence

When working
down the outcome
sequence ask,

“How?”

“How is it that...”



When working
up the outcome
sequence ask,

“So what?”

“Why is it
important for...”



Identify Indicators

- What does the outcome look like when it happens?
- What would tell you that it has happened?
- What can you count or measure?
- Indicators:
 - are specific enough to lead different people to draw the same conclusion
 - can be measured with reasonable cost, time and effort

Examples of Indicators: Homework Tutoring

Outcome Type	Outcome	Indicator
Knowledge	Students know good study habits	# and % of students who can identify at least five guidelines for effective studying
Behavior	Students complete homework on time	# and % of students whose teachers report homework assignments turned in on time
Improved Condition	Students have good academic achievement	# and % of students earning A's or B's who maintain their grades # and % of students earning C or lower who improve their grades following completion of the program

The Dream House Exercise

- Imagine you have won the lottery and you can now buy your “dream house.”
- You go to an agent and she/he says, “can you be more specific? What does your dream house have?”







Dashboard Indicators

Easy to Assess Presentations for Boards and Donors



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Are We On Track?

Measures	Number and Percent	Status
5 measures in Healthy Child Development, 4 in Increasing Youth Opportunities, 3 in Sustainable Employment and 2 in Affordable Housing.	14 or 52% of 27 measures	
3 measures in Affordable Housing, 2 in Sustainable Employment, 1 each in Increasing Youth Opportunities and Healthy Child Development	7 or 26%	
4 of 6 are the Public Policy measures, reflecting our first foray into tracking progress in this area as well as timing – many efforts are related to the state budget which is unresolved during this reporting period.	6 or 22%	
	No measures fall here	







Healthy Child Development -- Summary



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Measures	FY08 Target	Progress to Date	Status
Number of children in quality programs	21,763	16,524 76%	
Number of staff trained in social-emotional development	1,649	882 53%	
Number of agencies committing to best practices in reducing or eliminating child expulsion	16	15 94%	
Children retained in community child care programs *(in agencies + consulted about)	472	419+314* 89%	
Programs using research-based assessment tools	176 programs	203 sites	
Programs using family support practices	41 programs	34 "offerings"	
Public Policy			

Increasing Youth Opportunities – Summary

Measures	FY08 Target	Progress to Date	Status
Number of youth in high quality programs	115,740 youth	115,126 youth 99%	
Number of youth in <u>agencies</u> that track gains in positive youth outcomes	63,000 youth 36 agencies	56,757 youth 90%	
Number of afterschool staff trained to engage youth and identify social-emotional issues in the way of learning	1,900 staff 8,000 hours	1,568 staff - 83% 18,891 hours -236%	
Number of youth in programs that intentionally connect with schools	5,681 youth 58 program sites	9,138 youth -161% 63 program sites - 108%	
Number of youth with supportive adult mentors	7,096 youth	5,311 youth 75%	
Public Policy			

Affordable Housing – Summary



Measures	FY08 Target	Progress to Date	Status
Number of housing units produced, preserved or in property management	7,647	4,386 57%	
Number of homeless services agencies operating under a Housing First philosophy	11 -- 3,496	11 -- 2,744 78%	
Number of individuals who have obtained affordable housing	3,541	1,233 35%	
Number of individuals who have retained affordable housing	15,209	4,640 31%	
Number of individuals who have gained financial skills	2,968	1,235 42%	
Number of individuals who have gained financial stability	818	292 36%	
Public Policy			

Employment Leading to Financial Stability - Summary



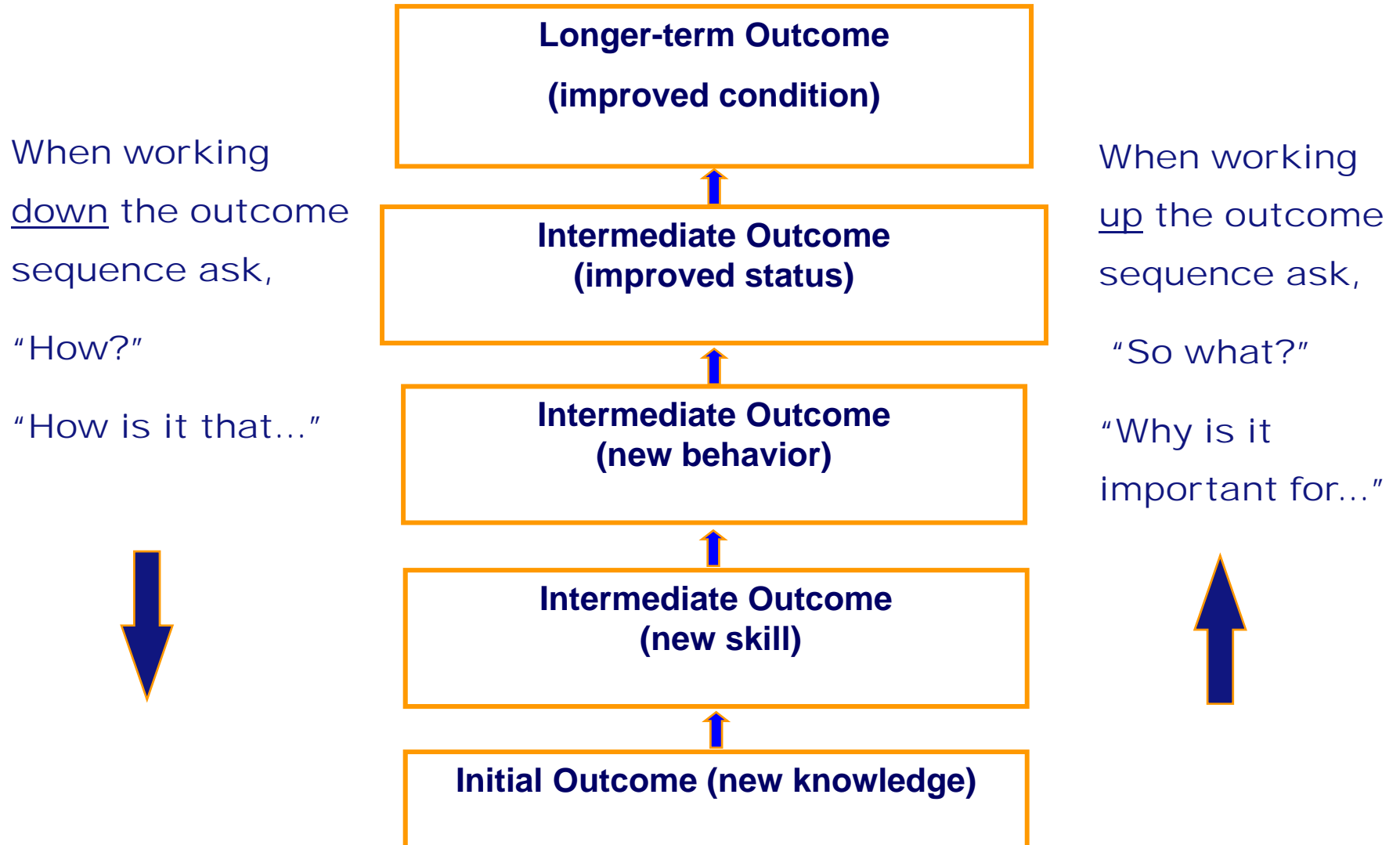
Measures	FY08 Target	Progress to Date	Status
Gained Basic Skills	4,105	1,625 40%	
Gained Job Skills	8,602	6,072 71%	
Obtained Employment	4,952	2,346 47%	
Achieving Retention, Upgrade, or Wage Gain	1,874	1,664 90%	
Gained financial skills	618	226 37%	
Gained financial stability	60	36 60%	
Public Policy			

Are We On Track?

- To what areas of your business can you ask this question and to what areas of your business can these models and metrics apply?
 - Programs
 - Departmental operations
 - Budgets
 - Development
 - Strategic Plans
- Bottom line – this is a model that you can apply to all aspects of your operation. In fact, a comprehensive assessment of all of these areas of your business when considered in relation to one another can be a sobering experience.

**NOW IT'S YOUR
TURN**

What Does “If / Then” Outcome Sequence Look Like for Your Organization?



The Dream House Exercise – Part Two

- What is the critical mission of your organization? What is the fundamental service that you provide?
 - If multiple, select one for purposes of this exercise – pick the one that is keeping you up at night.
- What are your desired outcomes for this program?
 - Start with the “end game”
- In order to accomplish that outcome, what must the individual have to know or learn in order to be able to achieve that outcome? What service must your organization provide in order to achieve that outcome?
 - Do you have the ability to create that condition?
 - Is your program structured in such a way to drive to that outcome?

The Dream House Exercise – Part Two

- Follow the structure of the program backwards from a successful outcome to the logical starting point.
 - Does your program follow in a logical order if you consider the “if/then” logic sequence we previously discussed?

The Dream House Exercise – Part Three

- Use your “if/then” model to complete the following:

Inputs	Activities	Outputs	Outcomes
Resources	Activities in programs	# of activities	Benefits to participants

The Dream House Exercise – Part Four

- Use the data from Step 3 to identify the matrices that best summarize the status of your program.
- Question – what column from Step 3 is my starting point?

Measures	FY08 Target	Progress to Date	Status

What Next?

- In the exercise you just completed, you took a look at who you are and what you are doing today.
- Ask yourself the following:
 - What do I want my program (or my organization) to look like tomorrow?
 - If this is my goal, what do my “if/then” models need to look like? What will be different?
 - How does these models translate into my logic models?
 - Based on my logic models, what are the resources I am going to need to accomplish this objective?
 - What is it going to take to get those resources in hand?
- This is an ongoing sequence and assessment that connects to so many other parts of your business – but it all starts with understanding your goals and objectives.

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