



# **Report from the Outcome Measurement Work Group**

## **February 2005**

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**The Charlottesville/Albemarle  
Commission on Children and Families**  
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### **Introduction**

The Outcome Measurement Work Group has been a key force within CCF in carrying out its original charge to make program and funding recommendations to the City and County (Joint Agreement, 1997). This report briefly summarizes the history of the Outcome Measurement Work Group since it was established in 1999, and focuses particularly on the opportunities and challenges faced in 2004.

In May 2003, Outcome Measurement Work Group members revised their charge to emphasize not only continuous improvement of the funding application process, but the development of an investment strategy in partnership with City-County agencies to meet identified community needs. Members have put forth a set of four recommendations which they believe are critical for continuing the “Focus Areas Project”. The “Focus Areas Project” is an initiative intended to guide the funding of efficient and effective programs that are responsive to identified community needs through an assessment of available human services, a data driven analysis of needs, engagement with community stakeholders and citizens, and a conscious investment strategy that seeks to improve conditions in high-need, low-resourced focus areas in Charlottesville/Albemarle.

### **Background**

Early in the formation of the Charlottesville/Albemarle Commission on Children and Families (CCF). CCF was tasked with providing annual recommendations to the localities about funding community non-profit agencies. The City of Charlottesville and Albemarle County allocate approximately \$2 million annually to approximately 20-25 local non-profits, and have an application and review process that is shared, in part, with the United Way-Thomas Jefferson Area. When CCF began to manage this process in 2000, Commissioners were interested in recommending the efficient spending of government funds. Commissioners and staff members also saw this as an opportunity to act on CCF’s mandate as an advisory board to the City Council and Board of Supervisors by giving them solid advice about where they might want to invest to improve conditions for children and their families.

The Outcome Measurement Work Group was established as a joint CCF/United Way-Thomas Jefferson Area work group in 1999. The work group’s initial goal was to work in partnership with local non-profit agencies to meet identified community needs using outcome measurement as a tool. The intent of integrating outcome measurement into the application process was to demonstrate the impact and value of programs, as evidenced by changes in behaviors and conditions programs achieved over time. As part of the revised application process, non-profit programs were asked to define their beneficiaries, and to develop “logic models” to show the theory behind their approach and the short and long-term outcomes anticipated at each phase. At the same time, CCF staff conducted research to understand the barriers and resources families faced when raising children. The common goal was to support effective programs that addressed needs identified through research, best practices, and ongoing engagement with citizens and stakeholders within and outside of CCF. The Outcome Measurement Work Group made a few decisions early on about the form of the out-

come measurement application process. These were:

(1) *Proceed as a Partnership* – The vision held by a joint work group of agency and funders was, “Human service agencies supported through funding, use outcome data and information to increase effectiveness, improve performance, and meet community needs.”

(2) *Base project outcomes on agency experience* -- The second major decision made was not to standardize outcomes in the application process by requiring all agencies to respond to the same set of expectations. This was based on the belief that program staff know their beneficiaries best – they can describe those who need their services, they can develop logical approaches to serve these residents, and they can figure out the best way to measure their progress.

(3) *Begin with a community vision* -- From the formation of the original work group, members were clear that they intended to do more than simply changing application forms and creating different “hoops to jump through”; they were committed to meeting the needs of the residents in the community using outcome measurement as one tool.

In the first year, the Outcome Measurement Work Group reviewed national models and– after many interviews and reviews –chose one model and a consultant with proven success in similar communities and endorsed by the national United Way. CCF and United Way-Thomas Jefferson Area invited a pilot group of twelve agencies to participate in a new outcome measurement-based application in 1999. This “agency advisory group” worked alongside members of the Outcome Measurement Work Group to revise the questions, improve upon the reporting forms and otherwise work out the kinks of the start-up year. There were many other innovative suggestions for the process, including multi-year funding and web-based training tools for new agency staff that were considered, but not implemented. At the end of 2000, there was a unanimous decision among pilot agencies to support the localities in rolling out the process for the full group of locally funded non-profit agencies in the year 2001-2002. To support this transition, CCF and United Way offered extensive training workshops, trained a core of volunteer peer tutors from agencies and the community, and extended the time available to complete the application.

While the Outcome Measurement Work Group crafted the application process and attended to its continuous improvement and connection to community needs, the City/County review process itself was conducted by another CCF work group responsible for providing recommendations to the two localities: The Agency Budget Review Team (ABRT).

## **Recent History, 2003-2005**

### **Funding Process**

Currently Charlottesville and Albemarle are in the fifth year of using outcome measurement as part of the City-County-United Way application. Many non-profit agency applicants are accustomed to this approach and report on their progress annually. Outcome measurement is now part of the local funding landscape, and most agencies have developed expertise in this area for the City and County, as well as for other state and private funders and internal systems.

The Outcome Measurement Work Group has worked to improve the funding review process, tap-

ping the resources of its members -- an engaged group of citizens, agency representatives, and local government. Resources (staff, agency, and reviewer time) have consistently been discussed by the Outcome Measurement Work Group and presented as a barrier to optimal roll-out of outcome measurement. For example, the Outcome Measurement Work Group has advised several improvements to the Agency Budget Review Team for the application process over the years, including developing a template for conducting site visits, making recommendations for increased communication between funders and agencies, and suggesting that CCF provide increased technical assistance to agencies in data collection and reporting. More recently, agency members on the work group have encouraged increased transparency of the review and rating process, and CCF staff has made the ABRT ratings available to programs. Staffing limitations at CCF have meant that many of the recommendations have not been implemented and that training has decreased rather than increased, with the hope that more agencies develop in-house expertise. In its City-County budget submission for the upcoming fiscal year 2006, CCF requested funds to support some of these capacity building and analysis functions.

Agencies, as well, have had to incorporate data collection on outcome measures into their course of business without additional resources and this has presented a challenge for some of them. As the Agency Budget Review Process has remained relatively similar -- an annual fast-paced review and analysis producing written recommendations -- a few organizations have asked for increased interaction and partnership throughout the year in the annual evaluations given to the Outcome Measurement Work Group.

On the whole, annual evaluation results have remained positive on outcome measurement as a tool within the application process and on the review team summary booklet, and agency staff have consistently provided suggestions for clarifying forms, reporting or questions. For example, in 2003, 90 percent of agency staff responding reported that they found outcome measurement beneficial to their agency beyond the application process.

### **Community Needs**

Given the roll-out of the application process, the Outcome Measurement Work Group moved from a quality improvement body and adapted a revised charge in 2003 which focused it more precisely on matching community needs with community investments. The charge is:

- (1) To make recommendations to the CCF and local governments on priority areas for funding consideration based on an analysis and evaluation of funded outcomes, community needs, and other factors;
- (2) To provide guidance and recommendations to the City/County/United Way funding bodies on continuous improvement of the outcome measurement application and review process.

The Work Group developed and began implementation of the Focus Areas Project, which is currently in Phase II. As noted in the recent publication, *Key Findings on Local Child and Family Needs (2004)*, the Focus Areas project is ambitious and well underway:

*The [Focus Areas] project is intended to guide the funding of effective and efficient programs that are responsive to identified needs. For Phase I of the project, data from over*

*40 reports was compiled about the service needs of children and families in Charlottesville and Albemarle, and organized into focus areas requiring attention. Phase II of the Project includes an analysis of the outcomes of programs funded through the City and County non-profit community agency process as they relate to identified focus areas. Phase III will broaden the scope beyond non-profit child and family services for a more comprehensive assessment of human service needs and resources. The final product will be a document that identifies areas of high need and modest investment as funding priorities, and provides ongoing policy and program recommendations. This report is considered an evolving document.....CCF invites local programs, citizens and researchers to submit data to CCF that will promote understanding of the needs of children and their families.*

During 2003 and 2004 CCF had access to University of Virginia graduate and undergraduate interns who completed the research on child and family needs, organized these into focus areas, and developed a portfolio of investments showing current non-profit program funding and outcomes. The accomplishments of the interns, work group members and staff included:

- Completion of a comprehensive child and family needs assessment spanning human services, as well as transportation, housing and other community indicators. This document, *Key Areas of Child and Family Needs 2004*, incorporated data from *Stepping Stones*, the CCF Community needs assessment, and a review of over 40 additional studies related to child and family well-being. The full document with all sources is available on the web and in hard copy. This was all done pro-bono by University of Virginia graduate student, Maryfrances Porter, Ph.D.
- Use of this data extensively by non-profit and public agencies seeking funding support and developing program innovations. CCF was able to capture some of this use in its annual survey of individuals who request technical assistance from CCF and data in securing funding; over \$600,000 was raised with the help of CCF data in 2004, and over \$550,000 in 2003. This does not capture use of data and reports downloaded from the CCF website. This assistance was provided to agencies primarily through the CCF's planner, Gretchen Ellis.
- The creation of a portfolio of investments and an analysis of the portfolio citing where the City and County might want to invest next, the strengths and missing pieces of the current portfolio, and the funds invested in each area. These FY03 investments in non-profit agencies– including financial contributions, outcomes, analysis and primary focus area – are all on the CCF website with extensive links to research. This mapping was conducted pro-bono by University of Virginia graduate students Jessie Owen and Hayley Daglis.
- Presentation to the Donor's Roundtable (a consortium of local philanthropic organizations) and other community groups of *Key Findings on Local Child and Family Needs, 2004* and broad distribution of the print material which has been cited in the media, in program brochures, public awareness and grant materials throughout the community. In part, due to *Key Findings*, CCF saw increased coverage of its reports in the media, from 19 spots in 2003 to 23 in 2004.
- Integration of the *Key Findings* Focus Areas into the 2004 City-County-United Way application process for child and family serving program as a means of introducing the concept to

agencies and inviting agencies to describe how their programs address these areas. These results will be tabulated and analyzed as part of the Focus Areas project.

After a productive year, the Outcome Measurement Work Group members met in November 2004 to assess progress and determine next steps. Members generated two priority recommendations to present to CCF, based on their work to date and their assessment of the resources needed to realize the original vision. There are four recommendations in total.

The first two recommendations are necessary for the full implementation of outcome measurement. These steps are necessary if the localities plan to identify funding priorities among the many needs listed in the focus areas and work in partnership with agencies to direct funding towards these priority areas.

What is at stake is whether to continue in “maintenance” mode with data that is soon to become outdated and a review process which is at risk of becoming a paper review only, or to continue to seek the resources to realize the original vision, which is in keeping with the advisor and catalyst role of the CCF.

The work group’s top two recommendations are as follows:

**1. Invest the resources needed to keep focus areas data current and relevant. --**

The Focus Areas project is a compilation of over 40 reports, based on a review of data collected by CCF between 2001-2003. Like *Stepping Stones*, new trends and information change annually and should be updated to show trends, changes and new areas for focus. The work group estimates that this task will cost approximately \$3,600.

**2. Create a human services budget to understand and summarize human service investments. --**

In order to make sound recommendations regarding human service programming and funding gaps, a corresponding document that measures overall public human service investments, or assets, is needed. Outcome Measurement work group members agreed by consensus that it was premature to set priorities based only on a summary of the localities’ needs, without taking into account the full range of human services offered outside of the 20-25 non-profits funded by the City. The development of a human service budget – or a more modest “child and family budget”-- was recommended to CCF in 1999, but no resources were available at that time to support it, nor was there sufficient staff capacity. (See appendix on the pros and cons of a child and family budget.) This entails a one-time cost of \$12,000 for consultation to create the budget, and an estimated \$8-12,000 in labor to enter the data and implement the project in the first year.

The Outcome Measurement Work Group has two additional recommendations which are dependent on additional resources, and represent its third and fourth priorities – a critical part of a phasing in of the full implementation plan. These are:

**3. Seek approval from CCF members on whether to expand scope of Focus Area research to human services, and invest resources to gather this data.** While CCF is charged with planning for child and family services, CCF has the responsibility for manag-

ing a human service agency review process for 20-25 community non-profits. In order to continue work matching community needs with community investments, better human services information is valuable. The Focus Areas Project reflects a summary of children and family needs and may under represent needs of elderly and adult populations. More comprehensive data is needed to guide Agency Budget Review Team (ABRT) programs decisions related to human services. The costs for this additional research are estimated annually at \$4,500.

- 4. Request that City-County adopt a human services strategic plan incorporating focus areas into data driven recommendations.** This would include writing a human services plan -- inclusive of the above research and human services budget -- making decisions about priority areas, and distributing final focus areas to target audiences, including local funders and government, as well as tracking, measuring and informing progress in focus areas and/or progress on the strategic plan for each locality. The costs for this are estimated at approximately \$9200.

The resources and benefits for these four recommendations are described in more detail in a table at the end of this report.

A second option outside of these recommendations is simply to maintain the continuous improvement role of the Outcome Measurement Work Group. With no additional resources, the Outcome Measurement Work Group members and CCF staff believe they can address the following issues related to the application process:

- Review updated *Key Findings on Child and Family Needs* (on an annual basis) to determine if new research is needed;
- Evaluate and monitor the agency application process/form (continuous improvement) and assess agency training needs;
- Address other issues that may emerge from the February 2005 presentation to the CCF of this report, if tasked to do so and resources allow.

## **Summary**

In short, volunteer and current staff resources are no longer available or sufficient to sustain the momentum established during 2003-2004. To improve the understanding of community resources and be in a position to make specific recommendations about where and how the localities should invest their funds, attract and leverage other donors to invest in areas of need, and to strengthen the original agency-funder partnership, additional information and staff support is needed.

An investment in a human services budget and an annually updated profile of community needs will allow CCF to make reliable recommendations as to where funding is needed, and to develop new sources of funding. With this information, the localities will be able to think more strategically about investing funds to improve conditions in addition to rewarding programs that have good outcomes. By aligning investments with current and emerging community needs, the localities can leverage funds to change conditions over time. In addition, localities can increase local resources

by encouraging other donors to support these focus areas.

Maintaining the Outcome Measurement Work Group without dedicating more resources to its information collection and analysis is possible, but much of the groundwork will be lost. CCF will have limited information to advise the localities on where to invest annually, and will not be able to keep abreast of current and emerging needs nor engage regularly in communication with agencies. Further, there is some risk that the partnership between funders and agencies will drift apart and outcome measurement will evolve into more of a paper review process than a movement intended to improve conditions for children and their families.

As economic pressures increase at the City and County, it is critically important to invest well in programs and in areas where change is needed, expertise is at hand, and improvement is possible. Outcome Measurement Work Group members seek support from CCF to help secure the resources necessary to implement the Focus Areas project.

<b>1. Keep focus areas data current and relevant</b>		
<b>Strategies</b>	<b>Estimated Annual Resources Needed</b>	<b>Benefits</b>
1.1 Collect and solicit available research from local public, non-profit and community agencies related to children and families and distribute.	1-2 hours weekly at \$15/hour/50 weeks (100 hours/ \$1500)	Comprehensive understanding of human service needs  More targeted investments
1.2 Adopt and revise "Key Findings document" annually for 2005 release. Add "emerging issues" section on the CCF website to capture new data, trends, information prior to annual publication.	Printing and distribution costs of \$500.	
1.3 Disseminate "Key Findings" to agencies, decision makers, and funders. Hold roundtable with stakeholders to discuss recommended focus areas of investment and community needs, resources and capacity	5 hours monthly/12 months (In-kind CCF staff and OM members) Roundtable: 20 hours per meeting/ 4 meetings (80 hours at \$20/hr/\$1600)	
1.4 Evaluate impact/utility of "Key Findings" in informing investments, raising awareness of local needs at the 6 month mark.	15 hours/April 2005 (in-kind);	
	<b>Total staff:</b> 255 hours <b>Total dollars</b> \$3,600	
<b>2. Understand and summarize human service agency investments</b>		
<b>Strategies</b>	<b>Estimated Annual Resources Needed</b>	<b>Benefits</b>
2.1 Design, compile and annualize a regional "Human Services Budget".	One-time contract with Finance Project- \$12,000. Staff person to implement, collect, and design – 20 hours a week/30 weeks for 1 <sup>st</sup> year (600 hours at \$20/hr/\$12,000; estimated \$8,000 in Year II). Design and Print time - \$3000. (30 Staff hours in-kind)	Informed investments  Reduced duplication
2.2 Annualize the community agency mapping in focus areas, FY04-FY06	30 hours staff /volunteer at \$15/hour (\$450)	Broader community of donors informed/ dollars leveraged
2.3 Compile estimate of local grant makers – public and private- funding in focus areas.	40 hours staff/volunteer at \$15/hour (\$600)	
	<b>Total staff:</b> 700 hours; <b>One-time dollars:</b> \$12,000 <b>First year dollars:</b> \$16,050 <b>Ongoing annual dollars for staff:</b> \$12,050	

**3. Confirm direction from CCF members on whether to expand scope of research to human services.**

Strategies	Estimated Annual Resources Needed	Benefits
3.1 Present OM recommendation to CCF for expanded data collection for focus areas.	40 hours (in-kind staff time)	Non-profit funding aligned with local human service needs.
3.2 If approved, expand focus areas to include human service needs. Collect and/or conduct research on elderly, single adults, adult criminal justice system, and other human service issues to expand focus areas document.	10 hours weekly at \$15/hour /30 weeks = \$4,500	
3.3 Finalize focus to guide City-County funding process. Present focus areas to City Council and Board of Supervisors as guidelines for funding investments	15 hours (in-kind staff time)	
<b>Total staff:</b> 355 hours. <b>Total dollars \$:</b> 4,500		

**4. City-County adopts human services strategic plan incorporating focus areas into data driven recommendations.**

Strategies	Estimated Annual Resources Needed	Benefits
4.1 Seek guidance from CCF as to whether to expand CCF's mission from children and families to human services. If expanded, present proposed new scope to County and Board. If not expanded, limit scope of Focus Areas project.	50 hours in-kind staff time	Regional plan for future human service investments
4.2 Write human services plan and/or distribute final focus areas to target audiences, including local funders and government.	20 hours (in-kind staff time) for distribution of focus areas only OR estimated 200 hours at \$20/hour (\$4,000) (additional paid) for writing human services plan	
4.3 Track, measure and inform progress in focus areas and/or progress on strategic plan for localities.	15 hours/month at \$20/hour /12 months (180 hours/\$3600)	Measured progress on priority issues
<b>Total staff:</b> 250-450 hours <b>Total dollars \$:</b> 5,200- 9,200		

**Appendices:**

- A. Outcome Measurement Work Group Charge
- B. Children and Family Budget Pros/Cons

## **Appendix A: Outcome Measurement Work Group Charge**

Outcome Measurement Work Group  
2003 Revised Charter  
May 2003

The Outcome Measurement Work Group is charged with (1) making recommendations to the CCF and local governments on priority areas for funding consideration based on an analysis and evaluation of funded outcomes, community needs, and other factors; (2) providing guidance and recommendations to the City/County/United Way funding bodies on continuous improvement of the outcome measurement application and review process.

Specifically, the Work Group will:

1. Develop a plan for making recommendations for priority areas:
  - a. Serve as an advisory group to develop local funding priorities. Provide guidance to CCF staff and Interns as they seek to analyze funded community and public agency outcomes in light of identified needs and gaps, effective and efficient practices, available research on proven practices, scope of existing services, funders' strategic priorities and areas of cost concern, and resident input.
  - b. Develop a timeline for a strategic plan that allows agencies time to respond to priority issues prior to a funding cycle.
  - c. Coordinate information collection with existing CCF work groups -- including Needs Assessment, Data Management and Agency Budget Review Teams --to inform analysis.
2. Ensure continuous Improvement of Outcome Measurement Process:
  - a. Analyze annual evaluation results of ABRT process – agencies and funders -- and make recommendations to CCF for policy level decisions and enhancement of future review processes, such as rating criteria.
  - b. Make recommendations to CCF for improved coordination of data collection by community agencies as part of annual community agency application process.
  - c. Identify models for measuring outcomes related to community perspectives, public awareness, and availability of community support to assist relevant agencies.
  - d. Review outcome measurement application form, review process, and training schedule annually and make improvements or modifications as necessary, based on evaluation, reviewer notes, and available resources.
  - e. Determine the future use of pilot site visits within the review process and communicate recommendations to CCF, ABRT and agencies.
  - f. Revise work plan and initial outcome measurement work group logic model to measure current and future work group results.

The Work Group will develop a timeline for completion of strategies to present to the CCF. As part of this task, participants will revisit membership to insure adequate and effective representation and expertise of stakeholders. As a result of the actions associated with these strategies, the Work Group will act as a catalyst for the work of the Commission.

## Appendix B: Child and Family Budget Pros and Cons

Excerpt from A Guide to Developing and Using Family and Children's Budgets, Aug. 1998, The Finance Project

A family and children's budget is a document that summarizes spending for children and their families for a nation, state, county, city or community... A family and children's budget can help answer seemingly simple questions like: How much is spent, for what service, and by what agencies? How much are costs increasing or decreasing? How are spending priorities changing over time? And also more complex questions like: Are children receiving their fair share of revenue growth? In times of cuts, are they protected more or less than other parts of the budget? How does our spending for children's services compare to other similar jurisdictions? Are we using our resources efficiently? What investments will produce the greatest future benefits for child and family well-being and reduced cost of remediation?

### TO CREATE, OR NOT TO CREATE, A FAMILY AND CHILDREN'S BUDGET

#### Arguments in Favor

**Better Decisions, Better Results:** A family and children's budget could lead to more informed decisions about financing family and children's services and supports. This, in turn, could lead to more effective use of resources and better results for children and families.

**Improved Coordination and Efficiency:** With better information about common services and functions, a family and children's budget can help make better sense of spending within and across service systems, and lead to more coordinated and more efficient delivery of service.

**A Shift Toward Prevention Investments:** Better information about the financial (and political) stakes of investing, or failing to invest, in children and families can help make the case for a shift to an investment approach to family and children spending. Investment in prevention could help reduce long-term costs of remediating bad results.

**Support for Building Partnerships:** A family and children's budget can provide better information about the many players, across and within state and local boundaries, involved in family and children's services. A family and children's budget can help identify shared policy and financial interests, support existing partnerships, and help build new ones.

**More Effective Advocacy:** A family and children's budget can serve to educate decision-makers, the media, and the general public about issues of child and family well-being. It can make the budget process more accessible, and advocacy for children and families more effective.

#### Arguments Against

**It's a lot of work.** Family and children's budgets may not require much in the way of new spending for staff, but they will add to the workload of people already in the system.

**Data are often hard to get.** And even when obtained, data are often not comparable across systems or jurisdictions or levels of government.

**It is difficult to define boundaries between what should be included and what should be left out.** Everything can be considered "related to families and children" by some definition.

**It might embarrass someone.** A family and children's budget might touch a nerve or two. It may show where we are spending too much, as well as too little. It may show where we are spending money for the same things in different organizations. It may show one jurisdiction's efforts as inadequate compared to another.

**And what's so special about children (anyway)?** Why not have an elders' budget, or a middle-age budget? Why children?