How Faith-based Organizations Become Performance Driven

Two Catholic Agencies’ Challenges and Successes
Obstacles to developing a culture of outcomes in faith-based nonprofits
ITO or ETO?

ITO = Intentions Trump Outcomes
ETO = Efforts to Outcomes

Doing good for the right reasons... Intentions are key

Yes, you do have to have your heart in the right place, but you need to make sure your heart is connected to your hands—measuring outcomes can help with this

Good Intentions + Good Outcomes = Good Work
From Mother Teresa:

“Intense love does not measure, it just gives.”

“We are called upon not to be successful, but to be faithful.”

Outcomes seen as a source of boasting and as a temptation to pride . . . instead of as a responsible way to test the validity of our faith-based claims.
Overcoming the Obstacles

20th Century Theological Developments

• The struggles of history and efforts to bring about justice are the theater of God’s activity in the world
• We can be co-creators with God in bringing about God’s kingdom on earth
• Goodness as a concept means nothing if we don’t effectively address the world’s injustices

These insights have led to the proliferation of faith-based nonprofits and their challenge to measure effectiveness by attending to outcomes
Cherishing the Divine Within
From outputs to outcomes...
Cherishing the Divine Within
From outputs to outcomes...

<table>
<thead>
<tr>
<th>Giving Fish...</th>
<th>Teaching to Fish...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>My Sister’s Place Day Shelter</strong></td>
<td><strong>My Sister’s Place Women’s Center</strong></td>
</tr>
<tr>
<td>Day shelter for women with no formal meal service</td>
<td>Day shelter offering 3 meals per day; Provides case management with focus on accessing healthcare services, job readiness and lifeskills, and placement in housing.</td>
</tr>
<tr>
<td><strong>Christopher Place</strong></td>
<td><strong>Christopher Place Employment Academy</strong></td>
</tr>
<tr>
<td>Day Shelter for homeless men with limited meal service</td>
<td>18-month residential program emphasizing employment, self-sufficiency, sobriety, and community/family engagement.</td>
</tr>
<tr>
<td><strong>Hispanic Apostolate</strong></td>
<td><strong>Esperanza Center</strong></td>
</tr>
<tr>
<td>Drop-In Center for new immigrants with some referral services and informal ESL classes.</td>
<td>Multi-services center for immigrants, including formal ESL, Citizenship and computer courses, a medical suite offering primary, urgent and some specialty care, immigration and legal services.</td>
</tr>
</tbody>
</table>
Start by doing what’s necessary, then do what’s possible, and suddenly you are doing the impossible. –St. Francis of Assisi
Distribution and Use of Information

Executive Management Team

Program Data

Development

Advocacy + Communications

Program Managers

Front Line Staff
How we use Data

Strategic Planning

- Annual Outcome Reviews
- Monthly Data Digest
- Weekly Staff Reports

ST. ANTHONY’S
SAN FRANCISCO
Quality Care: In our residential drug and alcohol facility – we utilize the *No Contact in x Days* report to ensure our counselors are meeting the program requirements to meet with clients weekly.

Accountability: Our Employment Program collaborates across 3 Programs and a *Custom Box Score Report* of who’s completed which activities is sent to all coordinating Program Managers and Front-line staff.

Feedback Loops: Our Social Work Center has biweekly supervision with *Case Note Review* as a feedback loop on participant outcomes.
Monthly Meeting to report, review and discuss Program Outputs and Outcomes

The information shared and feedback given in this meeting is then distributed in many different ways:

- Program Management and Staff: Quick Feedback Loops towards Program Goals and Outcomes.
- Advocacy Program for addressing Systemic Changes
- Development for Grant Writing and Key Messaging
- Communications for Story Telling and Social Media
Our Social Work Center connects with clients to provide services and referrals that support, stabilize, and improve their quality of life.

- Challenges we faced in the past:
  - Staff did not share the same definition of the outcome
  - The outcome was measured too frequently

- How we Improved:
  - Staff and Management worked together to create a standardized metric
  - Created defined time frames of when Assessment would take place.
  - Staff received a monthly report informing them who was “due” for follow ups, along with quarterly outcome updates.
Measurement of Stability

- Housing
- Food Security and Access
- Income
- Mental Health Care and Access
- Physical Health Care and Access
- Substance Use
- Access to Needed Services

Overall Stability
Timeline of Assessments

- Baseline
- 3 Month Follow Up
- 6 Month Follow Up
- 1 Year Follow Up
2012 Results

**Baseline**

- Extreme Instability: 7%
- Unstable: 48%
- Safe: 41%
- Stability Managed: 5%
- Stability Managed Effectively: 0%

**3 Month Follow Up**

- Extreme Instability: 8%
- Unstable: 31%
- Safe: 54%
- Stability Managed: 5%
- Stability Managed Effectively: 2%
Overall Change

- Decreased: 9%
- Increased: 28%
- Maintained: 63%
Reporting...

• Client Level Use
  ▪ Service Plans, Money Management Tools

• Program Level Use
  ▪ Case note peer review
  ▪ Staff supervision
  ▪ Service Delivery quality

• Division Level
  ▪ Monthly Program Goal Reporting

• Agency Level
  ▪ Community Services Dashboard Report (collective impact of programs)
Goals & Objectives/ Monthly Reporting

Catholic Charities
ODBEC
Our Daily Bread Employment Center
STABLE WORK, STABLE HOME, BETTER LIFE

FY14 GOALS

Mission Summary
Since 2007, the goal of the Our Daily Bread Employment Center (ODBEC) has been to help individuals to become self-sufficient by obtaining stable work and stable housing. It is mission of ODBEC to serve as a one-stop comprehensive program—that may begin with a meal but ends on the road to independence.

Client Services
Goal 1: Connect clients to resources that will move them toward self sufficiency
- 80% Intake clients will receive at least one ODBEC service
- Clients will receive mainstream benefits as a result of Earned Benefit screening at ODBEC
- 100% of clients requesting substance-abuse treatment will be referred for services, 50% of those referred will obtain treatment
- 100% clients seeking emergency assistance, shelter, food and mental health will receive a referral and follow up within 72 hours of intake

Goal 2: Provide services to ODB guests
- Increase by 10% the # ODB guests who are better off as a result of the ODBEC intake
- Increase by 10% the # ODB guests who are better off once completing the Work 4 Success
- Increase by 10% the # ODB guests who are better off after receiving benefits
- Increase by 10% the # ODB guests who are better off after because of housing
- Increase by 10% the # ODB guests who serve as volunteers at ODB

ODB and Operations
OUTCOMES
Our Daily Bread
Monthly Reporting

### Summary - ODBEC Guests who accessed Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Meals Served</td>
<td>288675</td>
</tr>
<tr>
<td>Total Clients who Ate at ODBEC and Received Services from I&amp;R</td>
<td>1186</td>
</tr>
<tr>
<td>Total who Completed Work4Success</td>
<td>226</td>
</tr>
<tr>
<td>Total who Earned Benefits</td>
<td>225</td>
</tr>
<tr>
<td>Total who Accessed Housing</td>
<td>38</td>
</tr>
<tr>
<td>Total Volunteers who Received Services from ODBEC</td>
<td>179</td>
</tr>
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</table>
## Division Dashboard Reporting

### Dashboard Summary Report - Community Services

**Date Range:** 7/1/2012 - 3/31/2013

<table>
<thead>
<tr>
<th>Service Type</th>
<th>ODECC</th>
<th>CP</th>
<th>MSPFC</th>
<th>MSPL</th>
<th>MSFSC</th>
<th>MSFSC</th>
<th>AH</th>
<th>SH-ES</th>
<th>SH-TN</th>
<th>EC</th>
<th>Total</th>
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<tbody>
<tr>
<td>Meals</td>
<td>50009</td>
<td>19233</td>
<td>94237</td>
<td>47</td>
<td>29</td>
<td>306</td>
<td>112</td>
<td>23404</td>
<td>242123</td>
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<td></td>
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<tr>
<td>Emergency or Transitional Housing</td>
<td>110</td>
<td>142</td>
<td>47</td>
<td>29</td>
<td>306</td>
<td>112</td>
<td>23404</td>
<td>242123</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Placed in Housing (Transitional or Permanent)</td>
<td>54</td>
<td>42</td>
<td>42.84%</td>
<td>68.75%</td>
<td>49.32%</td>
<td>53.44%</td>
<td>105</td>
<td>360</td>
<td></td>
<td></td>
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<tr>
<td>Retention - 6 months</td>
<td>6</td>
<td>3</td>
<td>16</td>
<td>7</td>
<td>47</td>
<td>26</td>
<td>105</td>
<td>360</td>
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<tr>
<td>Exhibited to Permanent Housing</td>
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<tr>
<td>Completed W45S</td>
<td>22</td>
<td>136</td>
<td>70</td>
<td>21</td>
<td>3</td>
<td>15</td>
<td>106</td>
<td>373</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Placements</td>
<td>22</td>
<td>136</td>
<td>70</td>
<td>21</td>
<td>3</td>
<td>15</td>
<td>106</td>
<td>373</td>
<td></td>
<td></td>
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<tr>
<td>% Placement of Full Benefits</td>
<td>18.11%</td>
<td>60.29%</td>
<td>64.52%</td>
<td>4.76%</td>
<td>100.00%</td>
<td>32.33%</td>
<td>4.72%</td>
<td>45.54%</td>
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<tr>
<td>% Placement of 6m Retaining</td>
<td>22.73%</td>
<td>11.49%</td>
<td>11.49%</td>
<td>22.73%</td>
<td>11.49%</td>
<td>22.73%</td>
<td>11.49%</td>
<td>12.02%</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Employers who were Hired</td>
<td>22</td>
<td>74</td>
<td>45</td>
<td>26</td>
<td>3</td>
<td>14</td>
<td>99</td>
<td>230</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unduplicated Clinic Patients</td>
<td>22</td>
<td>74</td>
<td>45</td>
<td>26</td>
<td>3</td>
<td>14</td>
<td>99</td>
<td>230</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Total Clinic Visits</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Mental Health, or Substance Abuse Services</td>
<td>20</td>
<td>29</td>
<td>29</td>
<td>29</td>
<td>29</td>
<td>29</td>
<td>29</td>
<td>29</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Unduplicated ESL Students</td>
<td>175</td>
<td>225</td>
<td>103</td>
<td>205</td>
<td>40</td>
<td>21</td>
<td>29</td>
<td>76</td>
<td>24</td>
<td>357</td>
<td>357</td>
<td>990</td>
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<tr>
<td>Management Services</td>
<td>175</td>
<td>225</td>
<td>103</td>
<td>205</td>
<td>40</td>
<td>21</td>
<td>29</td>
<td>76</td>
<td>24</td>
<td>357</td>
<td>357</td>
<td>990</td>
</tr>
<tr>
<td>Screened - Earned Benefits</td>
<td>909</td>
<td>7</td>
<td>2</td>
<td>20</td>
<td>2</td>
<td>20</td>
<td>2</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Funds Distributed:**
- Eviction Prevention: $20,194.94
- Traveler’s Aid: $33,279.27
- Utility Assistance: $37,093.13
- Total: $24,759.17

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*Note: The screenshot shows the report in a dashboard format with various data entries and percentages.*
Next Steps

Standardized Program Demographics and Intake

Growing the culture of using data as a learning tool

Applying Data to our 2014 Strategic Planning Process
Do the best you can until you know better. Then when you know better, do better—Maya Angelou
Keys to Success

- CC Executive and Management Support
- Connection to Strategic Plan
- Making the Business Case
  Quantifying Returns on Investment
  Connect to IT Strategy
Long-Term Vision

- CC Executive Director able to view division and program dashboards in real-time for the entire agency.
- Continued creation and support of Learning Culture.
- Demonstrate Community Impact through multi-year follow up on clients served.
- Continuous Improvement… the project should never end…
Contact Information

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Executive Director
St. Anthony Foundation

Nils Behnke
Board Member
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Brittany Hodge
Learning and Evaluation Manager
St. Anthony Foundation
Thank You