# Outcomes Measurement Toolkit

December 2022

## About This Guide

This document is designed to provide introductory information to organizations new to Outcomes Reporting. It is not intended to be an exhaustive set of step-by-step instruction.

The content is divided into 5 sections:

- Outcome Measurement Overview and Developing a Logic Model
- Data Collection
- Data Analysis
- Reporting
- Templates
- These templates must be used when reporting to Erie Insurance.

## Outcomes Overview

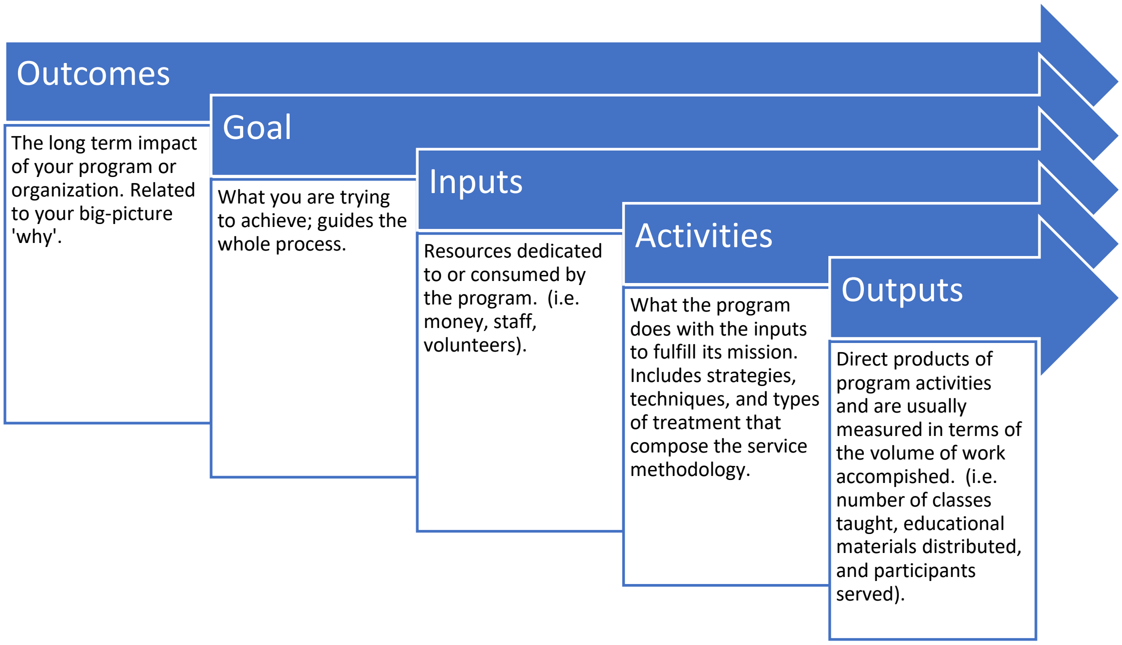
### What are Outcomes?

- Outcomes are benefits or changes for individuals or populations during or after participating in program services.
    - **They are not simply data or counts of accomplishments**
    - They help us see the differences programs make in the lives of people and can be used to:
        - help identify successes and opportunities
        - justify future programs and expenses
        - document our accomplishments
- They answer the question ***What difference or impact did the program make?***
- Outcome Measurement is the process for regularly assessing the results of an agency's programs.

## Logic Models

- A logic model is a theoretical description of how a program works to achieve benefits for participants.
- They help you:
    - Think through participants' progress
    - Develop a realistic picture of what you can expect to accomplish
    - Identify the key program components that must be tracked to assess effectiveness

## How to Build a Logic Model




# Data Collection

- One of the first questions you should ask after choosing your outcomes is: how will I know if the goal is achieved? This is your <u>indicator</u>.
- Key performance indicators (otherwise known as outcome indicators) describe observable, measurable characteristics or changes that represent the achievement of an outcome.
    - These are your substantive proof that you accomplished something
    - There are positive and negative indicators.
        - For example, if your outcome was to improve children's self esteem, you don't want to say proof would be the smiles on their faces. Consider finding proof by looking at school behavior reports.
- When you decide what proof (indicator) you are going to use, you will need to consider how you will get this information.
    - Select indicators that are based on data that is accessible (you have or can get)
    - Select data sources that are reliable and independent
        - Avoid things that rely on human judgement or have significant opportunity for bias
        - Avoid sources that aren't complete
- Think of it like a framework:
    - <u>Outcome</u>
        - The outcome or impact to your population as explained by your logic model
    - <u>Indicator</u>
        - Your proof
        - You will want one or more measurable indicators for each outcome
        - Indicators should be specific and quantifiable
    - <u>Performance Target</u>

        - Targets, or goals, are numerical objectives for a program's level of achievement on its outcomes
        - After a program has had experience with measuring outcomes, it can use its findings to set targets for percent of participants expected to achieve desired outcomes
    - Benchmark
        - Benchmarks can be used to establish your target and set growth goals
        - Possible sources include past years' results, industry standards, or peer results
    - Data Source
        - Identify a data source indicating where you will get your information
        - Possible sources include surveys, tests, and measurement instruments
    - Data Collection Method
        - Document the basic method and plans for data collection
        - When will the data be collected
        - Who will collect it
        - Where will it be stored
        - How will data quality be assured

## Data Analysis

- Four steps for analyzing data:
    - Enter the data and check for errors
        - Processing data means you are taking information from questionnaires, observer rating forms, and other documents and collecting it on a new form that helps you summarize the data
        - It is important to check for errors *while* you process data
    - Tabulate the data
        - Count the total number of participants for whom you have data
        - Count the number achieving each outcome status
        - Calculate the percentage of participants achieving each outcome status
        - Calculate other needed statistics such as averages or medians
    - Analyze the data broken out by key characteristics
        - Further analysis of the data can help reveal key information about the program
        - Key characteristics could include participant age, gender, racial/ethnic group, or program location
        - From this, you could understand if the program works better for one group over another, or see if different locations are having more success than others
    - Provide explanatory and contextual information related to your findings
        - See Reporting below

## Reporting

- It's important to understand what your numbers mean and take action from them
- Use industry benchmarks to compare to your peers
    - This may include thinking outside of the box for who your peers really are

        - Don’t forget to cross geographic borders
- Your findings may or may not meet expectations
    - That’s ok, but try to understand why and learn from that
        - Some reasons are external, like a sharp rise in unemployment in your area
        - Some reasons are internal, such as high staff-turnover
- **Share your plan on how to improve**
    - For outcomes that don’t meet your expectations, describe what you are doing or plan to do to improve them; the purpose of outcome measurement is to understand what factors impact your program, and how you can effectively achieve your mission - understanding what you need to do to improve is a big piece of that.

## Reporting Submission

- Use the template form that is sent via e-mail to submit your report online
    - This is **required** for all Erie Insurance Outcome Reporting
    - The form is housed on the Benevity platform; no login is required
    - A link is sent via e-mail around the 1st of each year. If you have trouble locating the e-mail or would like to submit your report early, please contact givingnetwork@erieinsurance.com
- **Remember**: the reader of your logic model and outcomes report may not be familiar with your organization or program
- **Outcomes are not simply goals**. Outcomes are the long-term impact upon your community, measured through indicators

## Scoring

- After submission, your request will be scored against our rubric and that feedback returned to your organization.

| | 0 | 1 | 2 | 3 |
|---|---|---|---|---|
| **Outcome Definition** | Submission is incomplete or unscorable. | Outcomes, indicators, and benchmarks are poorly defined or not linked. | Outcomes, indicators, and benchmarks are correctly defined, but relationships between them needs improvement. | Outcomes, indicators, and benchmarks are clearly defined, linked, and well sequenced. |
| **Goal Achievement** | Submission is incomplete or unscorable. | Organization regressed in attainment of goals. | Organization attained some goals, but not others. | Organization reached or exceeded goals. |
| **Data** | Submission is incomplete or unscorable. | No data is presented to substantiate findings. | Effort is made to provide reliable and measurable results, but requires additional context or data is of questionable quality or relevance. | Data is clearly presented in context, relevant, and easy to understand. |
| **Plan** | Submission is incomplete or unscorable. | Organization has not indicated a plan for improvement or does not address missed targets. | Organization shows awareness of missed targets or opportunities and offers some solutions/ improvements. | Organization has a clear plan for improvement and/or growth. |
| **Budget and Programs** | Submission is incomplete or unscorable. | Information about use of funds and programs held is provided, but alignment with outcomes and original request is not clearly articulated or acceptable. | Information about use of funds and programs held is provided and generally supportive of outcomes and in alignment with approved request. | Information about use of funds and programs held is clearly provided and well aligned with outcomes, request, and/or approved changes. |

Total possible score: 15