

What Data Should I Track? ...And Why?

<p><u>Demographics (Inputs)</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Age <input type="checkbox"/> Gender <input type="checkbox"/> Race <input type="checkbox"/> Language Spoken <input type="checkbox"/> Geography (City, Zip) <input type="checkbox"/> Education Level <input type="checkbox"/> Marital Status <input type="checkbox"/> Work Status <input type="checkbox"/> Income Level 	<ul style="list-style-type: none"> ◆ PD <ul style="list-style-type: none"> ○ Who is our client and do our programs meet their needs: Age & Development? Bilingual? Cultural? Can parents easily participate in programs or are education, language, and literacy barriers an issue? What is the family unit and can it be well supported or enhanced? ◆ QA <ul style="list-style-type: none"> ○ Are the clients appropriate? Are we focused on a specific client group or diverse in our outreach? Are there common environmental, educational, or economic drivers in the placement? Are any of these significant enough to require additional program support? ◆ FD <ul style="list-style-type: none"> ○ Are funds available to support clients meeting specific personal criteria such as geographic location, family education or income levels, or age-specific programs (i.e., zero-three or children’s medical/mental health)?
<p><u>Dedicated Resources (Inputs)</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Your Budget <ul style="list-style-type: none"> <input type="checkbox"/> Overall <input type="checkbox"/> By Program <input type="checkbox"/> Your Staffing <ul style="list-style-type: none"> <input type="checkbox"/> Administrative <input type="checkbox"/> Direct Service <input type="checkbox"/> Volunteers <input type="checkbox"/> Facility Usage <ul style="list-style-type: none"> <input type="checkbox"/> Overall <input type="checkbox"/> By Program <input type="checkbox"/> Equipment & Supplies <ul style="list-style-type: none"> <input type="checkbox"/> Overall <input type="checkbox"/> By Program 	<ul style="list-style-type: none"> ◆ PD <ul style="list-style-type: none"> ○ How much does it cost to operate? How many staff are needed – FTE, PTE, Volunteer? How much space is necessary and will additional facilities be required? Is special equipment or materials needed? ◆ QA <ul style="list-style-type: none"> ○ Is the cost/benefit for the program being met? Are staff and facilities adequate for program execution? Is the overall operation supported or drained by the program? What percentage of overall resources is used for the program? What percentage of total service delivery is met through this program? Are these too high or too low to meet program goals? ◆ FD <ul style="list-style-type: none"> ○ Can the program be sufficiently funded? Is there capacity for earned income and what is the price for the service? Is there high interest in private funding sectors? Are the facilities, staff, or equipment easily funded or donated? Is the program a cost savings to the community and client vs. similar offerings elsewhere? If not, is the value-add enough to offset cost?

<p><u>Service Units (Outputs)</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Inquiries for Service <input type="checkbox"/> Qualified Inquiries for Referral <input type="checkbox"/> Placements/Engagements for Services <input type="checkbox"/> Days of Service/ Placement <input type="checkbox"/> Days of Waiting or Unavailable Services <input type="checkbox"/> Sessions Held (counseling, classes, visitations, etc) <input type="checkbox"/> Length of Sessions/ Classes <input type="checkbox"/> Topic of Sessions/Classes <input type="checkbox"/> Daily Activity – meals served, diapers changed, outings, etc. 	<ul style="list-style-type: none"> ◆ PD <ul style="list-style-type: none"> ○ Are we meeting the goals for program services? Qualified clients? Adequate enrollment/census? Minimum units of service – hours, days, sessions? Are we receiving requests for additional services not offered? ◆ QA <ul style="list-style-type: none"> ○ Are we able to meet the demand for services? How can we support clients that must wait? Can we improve recruitment efforts for qualified clients and/or census goals? Are clients sufficiently accessing program components? Can access be improved – transportation, marketing, lower cost? Is low daily activity a staffing, training, or operational issue? Are services meeting the needs or do they need to be expanded or modified? ◆ FD <ul style="list-style-type: none"> ○ Are billable service units adequate to cover budgeted forecasts? Are billable units reaching contract thresholds? Can contracts be renegotiated or amended to assume more billed service costs? Are service units meeting quotas represented to funders?
<p><u>Trends (Outputs) – min. 3 years, 5 best to gauge trends</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Reasons for Referral/Placement <input type="checkbox"/> Referral Agencies/Sources <input type="checkbox"/> Reunification/Discharge Status <input type="checkbox"/> Prior Use of Services/ Recidivism <input type="checkbox"/> Outbound Service Referrals by Type <input type="checkbox"/> Length of 	<ul style="list-style-type: none"> ◆ PD <ul style="list-style-type: none"> ○ Is the program achieving its goals/mission in a consistent manner? Are trends in demographics or service units highlighting an unknown change in client pool or service delivery? Are changing referral reasons, client medical or other needs requiring additional services or staff training? ◆ QA <ul style="list-style-type: none"> ○ Are there anomalies in service trends? What are the causes and can they be remedied? Is there opportunity to improve program performance? Can staffing be supported in trend high/low points, i.e. census? Is the service being misused by clients? Have referring agencies drifted away? Is a new market emerging for client referrals? ◆ FD <ul style="list-style-type: none"> ○ The first measure of program impact and success! Do your service trends display unusual success or fill an unsupported niche that is of interest to funders in the public or private

<p>Stay/Engagement with Client</p> <ul style="list-style-type: none"> <input type="checkbox"/> Discharge Status (custody/foster, reunified, kin, etc.) <input type="checkbox"/> Mental Health () <input type="checkbox"/> Medical Needs (allergies, asthma, etc) <input type="checkbox"/> Your Demographics and Service Units Count, too! <ul style="list-style-type: none"> <input type="checkbox"/> Invaluable data for program development or quality assurance 	<p>sector? Can a long-term funder be re-engaged to offer multi-year support in a program for a period matching a successful trend? Can your long-term evidence engage a funder for specific services, i.e., medical care for clients? For specific client crisis, i.e. homeless, witness to violence?</p>
<p><u>Benefits (Outcomes)</u></p> <p>Short Term – Immediate ROI</p> <ul style="list-style-type: none"> <input type="checkbox"/> Achieved Service/Mission Goals: During and Immediately After Service <ul style="list-style-type: none"> <input type="checkbox"/> New Knowledge <input type="checkbox"/> Increased Skills <input type="checkbox"/> Changed Attitudes/Behavior <p>Long Term - Sustained Impact</p> <ul style="list-style-type: none"> <input type="checkbox"/> Achieved Service/Mission Goals: Impact over Time <ul style="list-style-type: none"> <input type="checkbox"/> Modified Behavior <input type="checkbox"/> Improved Condition <input type="checkbox"/> Altered Status 	<ul style="list-style-type: none"> ◆ PD <ul style="list-style-type: none"> ○ Are short term outcomes easily measured and tracked – pre- and post tests or questionnaires? Is input collected directly from clients and staff? Are the outcomes fulfilling program mission/goals? Are short term outcomes displaying immediate improvement or change for the client? Are long term outcomes supporting improved quality of life, client self sufficiency and/or improved family dynamics? ◆ QA <ul style="list-style-type: none"> ○ Are short term outcomes giving evidence of client capacity to achieve long-term impact? Are we losing contact with clients too soon to track long-term outcomes? Are we tracking appropriate information to determine program satisfaction long and short term? Are communications methods appropriate and easy to manage for the agency and the client? ◆ FD <ul style="list-style-type: none"> ○ Are long term outcomes supporting social and/or economic value for the community or funders? Have you sufficiently met the outcomes represented to the funder for program success? Are new opportunities for funding emerging due to unique success or significant value to community, i.e. public/governmental funds? ○ Can public data confirm or disprove your stated outcomes over a period of years?

<p><u>Comparatives (Value)</u> Similar public/private agencies, local/state/national data</p> <ul style="list-style-type: none"> <input type="checkbox"/> Costs for Services <ul style="list-style-type: none"> <input type="checkbox"/> Units <input type="checkbox"/> Annual Costs/Budgets <input type="checkbox"/> Board and Care <ul style="list-style-type: none"> <input type="checkbox"/> Direct Units of Service <input type="checkbox"/> Length of time in services <input type="checkbox"/> Discharge Results <input type="checkbox"/> Recidivism 	<ul style="list-style-type: none"> ◆ PD <ul style="list-style-type: none"> ○ What are your costs vs. their costs for the same service? What are the savings or benefits? Is there added value in study of combined cost and time factors? Does the program display significant efficiency or benefit to the client versus other compared services? ◆ QA <ul style="list-style-type: none"> ○ Is the data “apples to apples” or are assumptions applied? Is program outperforming in all comparative models or can one area be improved? Is the program functioning in a similar, improved or optimal delivery compared to its competition – is it “best in class”? ◆ FD <ul style="list-style-type: none"> ○ The case for investment! Does your program cost less, perform more efficiently, add economic value, or offer an alternative to traditional services? Can a case be made for long term impact of investment using outside data, i.e. % of abused children moving to adult services and related costs vs. early intervention, prevention, and preservation?
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What Data Should I Collect?

When in doubt, ask yourself,
 Can this data affect my:

- Program Development or Improvement
- Quality Assurance and Control
- Revenue Generation or Diversification

If the answer is yes, let the data collection begin!