Targeting

May 4, 2020
NASCSP members are state administrators of the U.S. Department of Health and Human Services Community Services Block Grant (CSBG) and the U.S. Department of Energy's Weatherization Assistance Program (DOE/WAP). NASCSP provides research, analysis, and training and technical assistance to State CSBG and WAP offices, Community Action Agencies, and State Associations in order to increase their capacity to prevent and reduce poverty and build economic and energy security.
Agenda

• Planning
  • Targeting
  • Measurement Tools

• Evaluation
What is your agency’s mission?
How do you know if you are fulfilling your mission?
Collectively, as a Network, we must...

UNDERSTAND OUR MISSION

MEASURE THE CHANGE WE CREATE

TELL THE STORY OF COMMUNITY ACTION
New CSBG Annual Report

Actualizes the Performance Management Framework as the vehicle that moves the framework forward
Planning

1. Need
2. Outcome
3. Services and Strategies
4. Targeting
5. Measurement Tool
Outcomes and Indicators

• An **outcome** represents a specific result a program is intended to achieve.

• An **indicator** is a specific, observable and measurable change that can be used to show changes or progress a program (service, strategy) is making toward achieving a specific **outcome**.
  • There should be at least one indicator for each outcome but there may be several different indicators that all work together to demonstrate the outcome.
  • An indicator helps you follow change over time. It is a way to detect progress or lack of progress toward an outcome.
Services/Outputs

• A service is what the agency does to achieve the outcome.

• The agency must consider how their services will be connected to a specific indicator, so it can be clearly connected to identified needs and outcomes.

• The identification of services are included in the planning process and are implemented by the agency.

• Not all services will lead to an outcome.
Services and Outcomes

SRV 4i: LIHEAP + SRV 2w: Parenting Supports + SRV 7d: Transportation = FNPI 3a: met basic needs for 90 days.
Planning for Outcomes: Targeting

• The GPRA legislation (Government Performance and Results Act of 1993/ Modernization Act of 2010) refers to “performance plans” and “performance goals,” which both relate to the concept of planning for specific results.

• Every NPI now has a target.
  • Previously, only some NPI’s in the IS required a target.

• A target demonstrates the agency’s expectation about your capacity to deliver results.
Planning for Outcomes: Targeting

COMMON ISSUE

Module 4, Section A: Individual and Family National Performance Indicators (FNPIs) - Data Entry Form

Goal 1: Individuals and Families with low incomes are stable and achieve economic security.

**Employment Indicators**

<table>
<thead>
<tr>
<th>Employment (FNPI 1)</th>
<th>I. Number of Participants Served (in program(s)) (#)</th>
<th>II. Target (#)</th>
<th>III. Actual Results (#)</th>
<th>IV. Percentage Achieving Outcome [III/I = IV] (%)</th>
<th>V. Performance Target Accuracy (III/I = IV) (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FNPI 1a The number of unemployed youth who obtained employment to gain skills or income.</td>
<td>65</td>
<td>59</td>
<td>59</td>
<td>91%</td>
<td>100%</td>
</tr>
</tbody>
</table>
Establish Targets

A target is the number **established before services** are provided that say what the agency expects to happen.

You can have more than one target.

It is very helpful to have several interim indicators to show progress in the middle of the program.
Module 4, Section A: Individual and Family National Performance Indicators (FNPIs) - Data Entry Form

Goal 1: Individuals and Families with low incomes are stable and achieve economic security.

**Health and Social/Behavioral Development Indicators**

<table>
<thead>
<tr>
<th>Name of CSBG Eligible Entity Reporting: ____________________________</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Health and Social/Behavioral Development (FNPI 5)</th>
<th>I.) Number of Participants Served in program(s) (#)</th>
<th>II.) Target (#)</th>
<th>III.) Actual Results (#)</th>
<th>IV.) Percentage Achieving Outcome [[III/ I = IV ] (% auto calculated)]</th>
<th>V.) Performance Target Accuracy (III/II = V] (% auto calculated)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FNPI 5a The number of individuals who demonstrated increased nutrition skills (e.g. cooking, shopping, and growing food).</td>
<td>100</td>
<td>100</td>
<td>96</td>
<td>96%</td>
<td>96%</td>
</tr>
</tbody>
</table>
Planning for Outcomes: Targeting

- The process for establishing targets also tests your ability to be realistic about what you expect to achieve.

- Realistic targets are based on benchmarks, sub goals, and interim indicators.
What is targeted?

• How many will be served? This is the first target number.

• Of those served, how many will achieve the outcome (will experience the change that is expected from the service)? This is the second target number.

• The relationship between these numbers produces a percent that shows the expectation of success of those receiving service.

• This is the foundation of data that will be used to identify what works and for whom.
| Employment (FNPI 1)                                                                 | I.) Number of Participants Served in program(s) (#) | II.) Target (#) | III.) Actual Results (#) | IV.) Percentage Achieving Outcome [III/|I| = IV] [% auto calculated] | V.) Performance Target Accuracy (III/|I| = V) [% auto calculated] |
|-----------------------------------------------------------------------------------|-----------------------------------------------------|-----------------|---------------------------|--------------------------------------------------------------------------|------------------------------------------------------------------------|
| **FNPI 1a** The number of unemployed **youth** who obtained employment to gain skills or income. |                                                     |                 |                           | #DIV/0!                                                                  | #DIV/0!                                                                |
| **FNPI 1b** The number of unemployed **adults** who obtained employment **(up to a living wage)**. |                                                     |                 |                           | #DIV/0!                                                                  | #DIV/0!                                                                |
| **FNPI 1c** The number of unemployed **adults** who obtained and maintained employment for at least 90 days **(up to a living wage)**. |                                                     |                 |                           | #DIV/0!                                                                  | #DIV/0!                                                                |
| **FNPI 1d** The number of unemployed **adults** who obtained and maintained employment for at least 180 days **(up to a living wage)**. |                                                     |                 |                           | #DIV/0!                                                                  | #DIV/0!                                                                |
| **FNPI 1e** The number of unemployed **adults** who obtained employment **(with a living wage or higher)**. |                                                     |                 |                           | #DIV/0!                                                                  | #DIV/0!                                                                |
| **FNPI 1f** The number of unemployed **adults** who obtained and maintained employment for at least 90 days **(with a living wage or higher)**. |                                                     |                 |                           | #DIV/0!                                                                  | #DIV/0!                                                                |
| **FNPI 1g** The number of unemployed **adults** who obtained and maintained employment for at least 180 days **(with a living wage or higher)**. |                                                     |                 |                           | #DIV/0!                                                                  | #DIV/0!                                                                |
Targets Identify the Scope of the Expected Results

Example of Results (Outcomes):
- Program participants pass the GED test
- Parents demonstrate increased knowledge of good parenting skills

Example of Targets (Projected indicators):
- 30 of 50 participants (60%) achieve a score of 85% or above on the GED exam within the program year
- 25 out of 50 parents (50%) achieve a passing score on a post test of knowledge related to parenting following the training program.
<table>
<thead>
<tr>
<th>Service</th>
<th># Unduplicated Clients Receiving the Service</th>
<th>NPIs (Outcome)</th>
<th>Family, Agency, or Community Level Goal</th>
<th># Unduplicated Clients Achieving Outcome (Target)</th>
<th>Indicator (Measurement Tool, Evidence of Achievement)</th>
<th>Timeframe for NPI Achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Management</td>
<td>51</td>
<td>3A Achieve and maintain capacity to meet basic needs for 90 days</td>
<td>Family</td>
<td>41</td>
<td>Self-Sufficiency Matrix, Employment, housing, food</td>
<td>90 Days</td>
</tr>
<tr>
<td>Case Management</td>
<td>10</td>
<td>3B Achieve and maintain capacity to meet basic needs for 180 days</td>
<td>Family</td>
<td>8</td>
<td>Self-Sufficiency Matrix, Employment, housing, food</td>
<td>180 Days</td>
</tr>
<tr>
<td>Case Management</td>
<td>10</td>
<td>3C Opened a savings account or IDA</td>
<td>Family</td>
<td>8</td>
<td>Savings Account balance ledger</td>
<td>60 Days</td>
</tr>
<tr>
<td>Case Management</td>
<td>10</td>
<td>3D Increased savings</td>
<td>Family</td>
<td>8</td>
<td>Increased Account balance Ledger</td>
<td>90 Days</td>
</tr>
<tr>
<td>Case Management</td>
<td>51</td>
<td>4B Obtain safe and affordable housing</td>
<td>Family</td>
<td>41</td>
<td>Lease</td>
<td>60 Days</td>
</tr>
<tr>
<td>Case Management</td>
<td>51</td>
<td>4C Maintain safe and affordable housing for 90 days</td>
<td>Family</td>
<td>41</td>
<td>Self-Sufficiency Matrix, Employment, housing, food</td>
<td>90 Days</td>
</tr>
<tr>
<td>Case Management</td>
<td>51</td>
<td>4D Maintain safe and affordable housing for 180 days</td>
<td>Family</td>
<td>8</td>
<td>Self-Sufficiency Matrix, Employment, housing, food</td>
<td>180 Days</td>
</tr>
<tr>
<td>Case Management</td>
<td>10</td>
<td>4E Avoid Eviction</td>
<td>Family</td>
<td>8</td>
<td>Confirmation with Landlord</td>
<td>30 Days</td>
</tr>
<tr>
<td></td>
<td>203</td>
<td></td>
<td></td>
<td>163</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Planning for Outcomes: Targeting

• You must define very precisely what it means to ‘achieve the outcome.’
  • Just being a part of the nutrition skills class does not mean that every participant will automatically demonstrate increased nutrition skills.
<table>
<thead>
<tr>
<th>Organization:</th>
<th>Program:</th>
<th>□ Family</th>
<th>□ Agency</th>
<th>□ Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identified Problem, Need, Situation</td>
<td>Service or Activity (Output)</td>
<td>Outcome (General statement of results expected)</td>
<td>Outcome Indicator</td>
<td>Actual Results</td>
</tr>
<tr>
<td>Identify the timeframe.</td>
<td>Identify the # of clients served or the # of units offered.</td>
<td>Projected # and % of clients who will achieve each outcome.</td>
<td>Actual # and % of clients who achieve each outcome.</td>
<td>Data Source, Collection Procedure, Personnel</td>
</tr>
<tr>
<td>(1) Planning</td>
<td>(2) Intervention</td>
<td>(3) Benefit</td>
<td>(4) Benefit</td>
<td>(5) Benefit</td>
</tr>
</tbody>
</table>

Proxy Outcome: Yes or No
How will you know that something has changed?

- Measurement tools are the **documents** that will **prove** your outputs and outcomes.
  - Pre- and post-tests
  - Proof from documents (pay check stubs, bank accounts, report cards, etc.)
  - Personal Reports (client statements)
  - Questionnaire
  - Scales and matrices
You have to PLAN to Measure

The measurement tool used should be identified in the planning process.

It should also be identified in planning, who is collecting this information, where it’s stored, and the frequency of use.

The measurement tool should be appropriate for the indicator. For example, attendance records for a class would not be a good tool for “getting a job”.
Timing and Use of Measurement Tools

• Timing and when to use the measurement tool needs to be determined in the planning stage and should be appropriate for the outcome being obtained.

• End result or Point in Time?
  • The housing progress indicators need periodic assessment.

<table>
<thead>
<tr>
<th>Housing (FNPI 4)</th>
<th>I.) Number of Participants Served in program(s) (#)</th>
<th>II.) Target (#)</th>
<th>III.) Actual Results (#)</th>
<th>IV.) Percentage Achieving Outcome (III / II = IV) [% auto calculated]</th>
<th>V.) Performance Target Accuracy (III/II = V) [% auto calculated]</th>
</tr>
</thead>
<tbody>
<tr>
<td>FNPI 4a The number of households experiencing homelessness who obtained safe temporary shelter.</td>
<td></td>
<td></td>
<td></td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>FNPI 4b The number of households who obtained safe and affordable housing.</td>
<td></td>
<td></td>
<td></td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>FNPI 4c The number of households who maintained safe and affordable housing for 90 days.</td>
<td></td>
<td></td>
<td></td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>FNPI 4d The number of households who maintained safe and affordable housing for 180 days.</td>
<td></td>
<td></td>
<td></td>
<td>#DIV/0!</td>
<td>#DIV/0!</td>
</tr>
</tbody>
</table>
Using Data for Decision Making

Decision Support

Good Decision Making considers both data and intuition.

• Reporting shows you **what is happening**, while analysis focuses on explaining **why it is happening** and **what you can do about it**.

• Data Analysis’s **recommendations** provides specific guidance on what actions to take based on the key insights found in the data. Once a recommendation has been made, **follow-up** on a decision is next (go/no go/explore further). Decision will be used in the next round of **ROMA Planning and Implementation**
Annual Report
Data Analysis
Can Inform Decisions In...

DEVELOPMENT/REVISION OF THEORY OF CHANGE
STRATEGIC PLANNING
PROGRAM STRUCTURE/IMPLEMENTATION PLANS
RESOURCE PLANNING
Theory of Change

• What does our data tell us about poverty in our community?
  • Does the data support your assumptions?
• Is the information consistent with your plans?
• What services and strategies lead to desired outcomes?
  • Do we need to update our Theory of Change to reflect different strategies or outcomes?
• Did you reach the goals you established?
  • Were they the right goals?
Strategic Plan

• What are the strategic goals of the agency as a whole?

• Is our program performance data reflecting those goals?
  • Do we need to update large strategic goals based on performance?
  • Do we need to adjust programs to meet our strategic goals?
Community Action Plan/Implementation

- Changes to programs
  - Strengthen/abandon
  - Strategies

- Changes to fund allocation

- Who operates programs?
  - Staff credentials, expertise

- Partnerships
Resource Planning

• Based on prior performance, do we have the right resources to reach program or strategic goals?
  • Human Resources
  • Funding Resources

• Do existing resources need to be realigned?
  • Move resources from underperforming programs or those with less strategic value to the organization to those that maximize investment
Results

<table>
<thead>
<tr>
<th>Health and Social/Behavioral Development (FNPI 5)</th>
<th>I.) Number of Participants Served in program(s) (#)</th>
<th>II.) Target (#)</th>
<th>III.) Actual Results (#)</th>
<th>IV.) Percentage Achieving Outcome (\frac{\text{III}}{\text{I}} = %) (auto calculated)</th>
<th>V.) Performance Target Accuracy (\frac{\text{III}}{\text{II}} = %) (auto calculated)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FNPI Si The number of individuals with no recidivating event for six months.</td>
<td>120</td>
<td>86</td>
<td>16</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>FNPI Si.1 Youth (ages 14-17)</td>
<td>7</td>
<td>6</td>
<td>7</td>
<td>100%</td>
<td>117%</td>
</tr>
<tr>
<td>FNPI Si.2 Adults (ages 18+)</td>
<td>113</td>
<td>80</td>
<td>9</td>
<td>8%</td>
<td>11%</td>
</tr>
</tbody>
</table>
## Results

### Module 4, Section A: Individual and Family National Performance Indicators (FNPIs) - Data Entry Form

**Goal 1:** Individuals and Families with low incomes are stable and achieve economic security.

**Health and Social/Behavioral Development Indicators**

<table>
<thead>
<tr>
<th>FNPI 5a</th>
<th>The number of individuals who demonstrated <strong>increased nutrition skills</strong> (e.g. cooking, shopping, and growing food).</th>
<th>0</th>
<th>0</th>
<th>0</th>
<th>#DIV/0!</th>
<th>#DIV/0!</th>
</tr>
</thead>
<tbody>
<tr>
<td>FNPI 5b</td>
<td>The number of individuals who demonstrated <strong>improved physical health</strong> and well-being.</td>
<td>264</td>
<td>125</td>
<td>264</td>
<td>100%</td>
<td>211%</td>
</tr>
</tbody>
</table>

Name of CSBG Eligible Entity Reporting: [Redacted]
THINGS WILL CHANGE
Rapidly Changing Times

• We know there is more funding coming out for agencies across the nation to support families during the national COVID-19 emergency

• In the short-run, you may have to make programmatic decisions and shift things around quickly

• The situation is uncertain and will change from one month to the next

• How do you target in such a climate?
  • Analyze shorter periods of time
  • Anticipate as best as you can how changes to program delivery will impact program performance
  • At the end of the day, a target is a target
Tools and Resources
The Community Services Block Grant (CSBG), administered by the states, provides core funding to local agencies to reduce poverty, revitalize low-income communities, and to empower low-income families to
Financial Well-Being
A state of being wherein you have control over day-to-day and month-to-month finances; have the capacity to absorb a financial shock; are on track to meet your financial goals; and have the financial freedom to make the choices that allow you to enjoy life\(^2\) (Source: Consumer Financial Protection Bureau).

Related Modules: Module 4
Also See: Income and Asset Building Services (SRV 3)

Head Start
Head Start promotes school readiness of children under 5 from low-income families through education, health, social and other services\(^3\) (Source: Office of Head Start). Head Start Is funded by the U.S. HHS.

Related Modules: Module 2, Module 3, Module 4
Also See: Early Head Start

\(^{19}\) [https://www.senate.gov/reference/glossary_term/fiscal_year.htm](https://www.senate.gov/reference/glossary_term/fiscal_year.htm)
\(^{21}\) [https://www.acf.hhs.gov/ohs](https://www.acf.hhs.gov/ohs)
Collecting, Storing, Analyzing, and Using Data FAQ's

Key Points-
- Elements of necessary data collection are found throughout the ROMA cycle.
- Data and information can be translated into knowledge to increase capacity and improve an agency's success at reaching its intended results.
- Data analysis can be both proactive and retroactive. It is used in predicting future trends and explaining past trends.

What is “data”?
- Data is facts that are observed, measured, collected, and aggregated.

How can data be used?
- Data can be examined to become information. This helps inform decision making in any sector of work. For instance, it is important to identify the population we serve, study trends, find patterns, predict future trends, and understand underlying factors of causal relationships.
- Analyzing data helps us go beyond just what is obvious, to fully understand what is not necessarily noticed right away.

What does it mean to have quality data collection?
- It is complete. There is no information missing from the data.
- It is accurate. There are no typos in the reporting of the data and all of the information is correct.
- It is timely. The data was collected on time, on a regular basis, and/or is recent enough to be pertinent.
- It is reliable. The data collected is meaningful to the topic, it is collected in the same way every time, and the people involved in collecting data understand what they are responsible for collecting.

Where should I store my data?
- Data needs to be stored in a safe and accessible environment. It should be backed up regularly and have adequate security measures in place to protect the information.
- People need to be trained on accessing the data and internal policies should govern storage procedures.

What do I do before I analyze my data?
- Before analyzing data, it needs to be organized.
- Identify what it is you are looking for. Having a goal in mind before analyzing data will help the process of finding the information that is useful in your decision making. Goal setting narrows down where to look to find the data.
- Organize the data to depict relationships among different components or show pathways of information, materials, money, personnel, etc.
  - They may include spatial or time representation or other kinds of graphing or using tools such as maps to help visualize relationships between data points.
Questions?

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