High‑Performance Measurement Framework

Series for SILCs: Part Three

How to Strategically Use Your Data to Raise More Money and Generate More Impact  
  
Presented by Sheri Chaney Jones and Jeremy Morris

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>> PAULA McELWEE: Good afternoon, everyone. Welcome to today's webinar. This is the third and final in this three‑part series called High Performance Measurement Framework: How to Strategically Use Your data to Raise More Money and Generate More Impact. I'm Paula McElwee with ILRU, and today's presentation is brought to you by the IL Net Training and Technical Assistance Project for SILCs and CILs, the National Council On Independent Living, Association of Programs for Rural Independent Living and Utah State University Center for Persons with Disabilities, with support that is provided from the Administration On Community Living at the U.S. Department of Health and Human Services. This webinar is being recorded and it will be available on demand within a few days. In fact, the prior two presentations in this series are already posted and we will drop ‑‑ Sharon, I think, will drop a link into the chat box if you're interested in going directly there to see those prior presentations and the other information or handouts available there.

You can also go to ILRU.org to find any of the materials related to this. So any supplemental material as well.

Today you'll have an opportunity to ask questions during the webinar. We'll take several question and answer breaks. If you move your cursor on your screen you should be able to see a bar along the bottom, and there in the middle one of the options is Q&A, questions and answers, right? And you can use that to type in questions at any time and then we will address them when we get to our break. So as soon as you think of a question, if you would like to put it up there, we'll have it waiting for our Q&A breaks and talk about them then. If you have a comment for us that isn't a question, use the chat feature. That works really well for all of us. So you can ‑‑ so you can let us know whatever it is you want to let us know about your experiences as you're listening to the webinar.

Captioning is also available. There's a CC tab for closed captioning tab on that same menu bar. So when you run your cursor over the screen again, it will pop up if you can't see it now, and you can use that captioning as well. Now, the size of the captioning can be changed to work ‑‑ whatever works best for you. If you are only seeing one line of captioning, you can put your cursor over it and it should show you an arrow that will let you drop down and make that captioning larger, you can display seven or eight lines of text instead of just one, or if you prefer you can view the full‑screen captioning. You are welcome to log into the chat there and you can enter your questions in that captioning chat and then we will respond to them at the Q&A breaks as well. You can ‑‑ and you can find that chat on the main webinar screen, and we have a link to it that will ‑‑ that is already shown up on the chat box.

One final bit of housekeeping, at the end of the webinar there is an evaluation form. It will open automatically in your web browser. Please do fill that out. It's short, easy to complete, and we really use those to improve the work that we do. So your feedback is very much appreciated.

Now I would like to introduce our presenter for today, Sheri Chaney Jones. Sheri is the President of Measurement Resources Company and for over 19 years she has improved government agencies and nonprofits and small businesses using performance management evaluation and organizational behavior best practices. Her experience and expertise has transformed measurement cultures and as a result saved public dollars, improved outcomes and demonstrated effectiveness and increased revenues. Prior to founding Measurement Resources Company in 2010, Sheri's work as the Performance Center Manager with The Ohio Department of Aging saved the State of Ohio $250 million in annual Medicaid costs with the creation of a long‑term savings calculator. Sheri is the author of "Impact in Excellence: Data driven strategies for a aligning mission, culture and performance in nonprofit and government organizations," published by JAS.

>> Paula: Back in 2014. And at The Ohio State University, Sheri taught a course on creating management cultures as part of the certified public managers program. Sheri earned her master's in industrial and organizational psychology from central Michigan university and her bachelor's with distinction in psychology from The Ohio State University.

I would also like to introduce Jeremy Morris. He is the Executive Director of the Ohio SILC, and he will be participating in some of this discussion because the Ohio SILC is working with Sheri's organization to do some statewide things for measurement to enhance the message from the SILCs to the statewide network. I am going to turn it over to you now, Sheri.

>> SHERI CHANEY JONES: Thank you, Paula. I am very excited to be here today with you. Our third webinar of the three‑part series. If you have not already reviewed Part I and Part II, I really encourage you to do that because each webinar did build on each other and on the framework. But overall the purpose of these webinars has been to help you understand what a high‑performing measurement culture is and how to create one in your SILC. Also, then, what's the importance of creating a logic model, a Statewide Independent Living Council logic model for success. And then today we're going to talk a lot about how to use this framework, and once you start to collect data around the framework, how to use it to attract funders with data and what really is that perfect framework for you and what are some communication strategies once you have data that will be very impactful.

So today we're really going to focus a lot on the communication piece, but as a refresh of where we've been over the last two webinars, is through all the research I have done around creating high‑performing measurement cultures in public sector and nonprofit organizations, having data is not enough if you really want to drive social change or generate more revenue or efficiencies or impact for your organization.

So the five pillars, if you will, are required, and the first ‑‑ in our first webinar we talked a lot about the culture piece and what is the measurement culture and some things to consider and think about when you're standing that up. And to me the culture is really the soil in which all of this grows. If you have that right framework and that right culture in your organization, using data will work much better than if you don't.

And then we talked about clarity. So before we can start talking about what is a measure and data and how to measure it to tell your story and evaluation, we have to get really clear on our mission. We want to make sure the measures we select are aligned with our mission.

And then we talked in webinar 2 around capture. So how do you capture the data once you've gotten clarity? How do you select the right measures? What are some examples of different measures?

So that's where we've been and today I'm excited to talk about communication. Once you have data, what are some best practices to tell your story, to communicate impacts and then also how do we use this information to change and pivot to increase even greater impact for those that we serve. And so today we're going to focus on the last two Cs, which are communicate and change or celebrate, and you're in for a real treat today because this is probably my favorite part of the three‑part webinar because this is where we see the magic happen. This is where we get to talk about how to use strategies to get people to align to your organization, donate to your organization, give you more grant dollars or more grant funding, and really create a real impact in your community.

So today we're going to talk about, so once you have data, what are some strategies to communicate your impact? Once you have this high‑performing measurement framework, what should you be doing with that information? How can you organize it to really benefit your organization?

So first off we're going to talk a lot about creating public value. Because most statewide Independent Living councils are receiving a mix of government dollars, maybe some private donations, but the reason that you exist is to bring some value from the public. And so if we want the public to buy into our cause, to buy into our movement, to donate and participate and volunteer and advocate and all that because of the work you're doing, we have to think about public value. So if we want to build public value and communicate the value that your organizations bring to the public, we have to speak to where our audience is listening from and really needing to kind of understand who are our stakeholders, where are they coming from, and align our message and align our story with their goals. We're going to give you a lot of things to think about about how to do that.

So as I'm talking today, I hope you're jotting down some notes, and also in addition to the webinar, we have complimentary workbooks to help really process this information, dig deeper and move forward, and I hope that you have been doing that. We've given you a couple weeks between each series. So I hope you have had a chance to interact with this information and really apply it to your particular organization.

So when we think about our strategic use of measures and communicating our public value, here are some guiding questions. So the first is to think about what kind of experiences are people having when they participate in the programs? So just to give a little bit of being able to talk about what did you do, how well did you do it if you are thinking back to webinar 2 and our measurement framework. So what kind of experiences are they having?

How your program provides more value than our competitors. I think sometimes in the public sector space, the government nonprofit space, we don't like to acknowledge that we do have competitors, and we do. We have competitors not only for the grant dollars that we may receive from our organizations, but we also have competitors in terms of where the individuals and the consumers that your organization serve, where they can ‑‑ where they can go and receive those services. And sometimes your competitor may be the current state. It may be the status quo. And for that individual. And if that individual is not engaging in your services because they're just sitting there with the status quo without getting their problem solved, it's very hard for you to deliver your mission. So really thinking about, are you providing more value for the individuals you serve that your competitors and, is your value significant enough to get those people you want to serve kind of out of their comfort zone or out of their sphere to seek you out and engage in your services.

Also focus on what your clients are really buying. So that's why we did in webinar that five why's exercise and I made you think about what was your why's, what were your clients' why's and what were your funders' why's. Because those why's which we then turn to outcome, what are they really buying? Are they looking to buy increased independence? Are they looking to buy reduced Medicaid costs? Are they looking to buy more connections in the community? Are they looking to buy a better reputation among a population within your community? Really focus on what they're really buying and be able to speak to that and have evidence of that.

And then again, do you have data that demonstrates the value of your work? So when we're thinking about public value, these are kind of the questions that we should be guiding our thinking and thinking about how do we take that measurement framework, how do we take that data and information and use it to bolster this story, to prove our impact.

So I don't know how many of you are familiar with the book by chip Heath and Dan Heath. I encourage you to pick this up and read it. Especially if you are thinking about now I have data, so what? What do I do with this information? How do I take this information to really make a difference? And what I think this book highlights, and I'm going to give you some ‑‑ the high‑level overview of this book, but what I feel like it highlights is it proves that you need both. When you're talking about the impact your organization has, how your organization is bringing public value, it's very important that not only do you have stories and anecdotes and the things that we traditionally think about in marketing, but that we also need that measurement data, we need that evaluation data. And this is why. So chip and Dan Heath, they have a framework that talks about how do we get someone to implement our ideas? So let's say you have a Statewide Independent Living Council and you've put together your measurement framework and you want your legislature to change a policy, or you would like them to allocate more resources in the general assembly budget for your organization. How are you going to go do this? And how will the measurement framework help you do this? And here's some things to consider when you're going to those entities and you're telling your story, what do we need and why do we need stories and evaluation data.

The first is, according to "made to stick," we need unexpected information. We need something that will get someone to pay attention. So if you have some data information about individuals living with disabilities in your community, whether it's about their needs or their unmet needs or their successes, but something that's a little bit unexpected, you know ‑‑ I don't know the statistics, but, you know, maybe you have some research that shows that 25% of the population is living with some for the of disability. Or have a family member or a friend, like, something that is maybe a little bit unexpected. Because that will get people to pay attention.

Then you also want to make sure that the message that you're communicating is concrete. So someone can understand it and remember it. And so sometimes data is the way to make that particular measure concrete. Paula mentioned in my bio and I'll tell this story later, about how I saved the state or helped save the state $250 million in Medicaid costs. That's very, very easy for someone to understand. It's very, very concrete. I'll go to communities around the country and I'll be introduced, and people will say, oh, yeah, yeah, you're the woman who saved all that money or, you know ‑‑ in Medicaid. Because it's concrete. It's something people can remember.

Also, your message needs to be credible so people can agree and believe it. We talked a lot in the second webinar about how when we're selecting measures we want to make sure they're face valid, that they're reliable, that we're using sound methodologies, sound survey approaches to generate that data so we can back up what we're measuring, how we're measuring it, why it's legit so people will agree the data that we share.

So those three things are very much related to our rational brain. They're very much related to how we logically process information. But if we want to really move people from knowledge and understanding to action, that's where we want to put in our stories and our emotions. So we also want our story to be emotional. Because if we can pull in the emotions, people can care. And lastly, we do want to have a story, a way that then people can act on it. I'm going to give you some examples today to help you see how once you have your measurement framework implemented and you start to collect that data, you can tell these really powerful stories with a combination of emotion and data that really inspires people to act and engage with your organization.

My first example involves an arts residency program that works with students with disabilities and students without disabilities in inclusive classrooms. So first I'm going to read a very powerful testimony. It's a very powerful story. It makes me kind of get chills every time. It's a very beautiful story. So this is traditionally where nonprofits are playing. So we have during this arts residency see the students explored through dance the different ways in which we love. The students were placed into groups and worked together throughout the process in partnering, poetry creation, and image searching.

So, Jada, this is where her story comes in ‑‑ so Jada, a student who is blind, has never experienced a dance or exercise class before. And Jada was partnered with another student, her name was Jada as well, and they were peer mentors. So ‑‑ basically what happened was that one friend Jada who was blind partnered with the typical peer, the other Jada, and in order to learn the dances and learn the movements, the typical peer would hold Jada's arms in place so she knew what the movements were. And they were able to partner together. And so by the end of the residency, Jada, who was blind, was able to perform on stage with peers without the assistance of her aide. So she was able to perform just like all the other students on the stage. And it was beautiful to see 3rd grade students being compassionate, understanding through peer‑to‑peer work in the arts, giving Jada the freedom to perform on stage for the first time. So when I think of this image, when I think about this story of these two girls in this arts residency class, learning about love and compassion and dance and movement, it's very beautiful. It's very powerful. And so I understand a lot about the importance of this arts residency program, and maybe I would want to get involved. But now when we add the data, we add the measurement framework data on top of it, then it gets even more powerful. So the story goes on to say that this particular program served nearly 2,000 students last year and 52% were like Jada, a student with a disability. So now I had this beautiful story, which was inspiring, but now I'm going to my logical brain, if I'm a decision maker reading this particular story, and now I know, oh, I might want to pay attention. Half the students served in this program are students with a disability. That's a thousand students. That's ‑‑ that's a great impact. They're really living out their mission. And then they go on to talk about their outcomes. So when we think about what did you do, how well did you do it, and is anyone better off, in this particular story we talked about how many students were served, which percentage of them had disabilities, and now we're going to move on to how are people better off.

100% of school administrators with the program in their schools agreed the program impacted student learning. So we have data to show the school administrators saw value in this program. 80% of teachers agreed that the program increased student creativity and the appreciation of arts. So if that's something I value, I'm, like, wow, a majority of the teachers think that's happening. And this last bullet, because of their measurement framework, they were able to prove how students experienced an 18 percent increase in the rate of growth in their reading fluency scores compared to the rate of growth before the residency.

You can see how now I am, like, wow, this is a great program, it serves a lot of kids, half of the students have disabilities, teachers and administrators see value in this program, and it's increasing their academic success. And so by sharing the story that gives me a visual, makes me care, makes me feel emotional, and the data to rationalize my decision, organizations are able to want to give to that organization and be involved. And then looking at this 80% of teachers agree, the organization themselves are able to go, well, that's good, but maybe that's not as good as we want it to be and they can dig deeper, and we actually did and dug deeper into that 80%, and what we learned is we found that the relationship between the teaching artists and the teachers were very, very key to their success. So then the following year they were able to make some program changes, program improvements in order to increase that 80% number. So more teachers agreed that it increased student creativity and appreciation of arts. So that's the importance of having a measurement framework, and once you have it, a story you can tell or he communicate your impact.

So let's go back to a story that your SILC might be able to play. And even at a statewide level. So let's think of program X. If you were a funder, which program would you want to fund? Program X that provided Independent Living Services to 3,000 adults living with disabilities? That sounds good. It helps me understand the scale in which you are providing services. Or program Y. Because our Independent Living Services, serving 3,000 adults living with disabilities, 100% of clients reported their needs were met, and 71% successfully lived independently for 365 days. For every $16,000 donated, we can keep one person in their own home for one year, a $19,000 savings, a 118% return on our investment.

So when I ‑‑ so you can see the stark difference between program X and program Y and, of course, most funders want to fund a program Y story. So today's webinar is how do you use your measurement framework to be able to move from program X to program Y and tell a program Y story? That's what we're going to talk about today, give you the formulas, help you think about that, but I also want you to be thinking about how would having a program Y story help your organization? If you really could share that story about how you were meeting the needs of those residents in your community, how you were increasing their independence, and, then, again, what is that return on their investment?

So how did the program Y story come about? A lot of people assume that the program Y story, it's going to cost a lot of money and a lot of time. But what we talked about in webinar 1 is that these particular ways to measure and talk about our impact do not require ‑‑ they do require a little extra work, or maybe building up the data capacity so that we are measuring the right data, but once we do that, it doesn't really require a whole lot more expense than that, and the power and the benefits completely outweigh maybe the work it takes to set it up. So how do we get to program Y? First we needed outcome measures. So the outcome measures in this particular example was the perception data of needs met in independence. So those were survey questions giving to particular residents served and they asked about, did our program meet your needs. You could measure needs that way. Or you can measure needs through an actual looking at ‑‑ through your databases. You know, this was a need of a client. It didn't take. And did they get their needs met. You can check if they did or not. And also, living independently was how did they use a self‑report measure. Did the individual report ‑‑ that since engaging those services they feel like their independence has been increased. And the other outcome measure that was used to calculate that return on investment was living outside an institution for 365 days after nursing home discharge. So this particular outcome measure is that individuals are being discharged from nursing homes, placed in a home community setting and those individuals are tracked to see if they maintained living independently for at least one year.

And then the outputs, this is my very favorite measure, ever. I think everybody needs to understand their average cost per successful participant. I'm going to go back a slide here just so we know what we're talking about. So when we talk about that for every $16,000 donated we can keep one person in their own home. So how did we get to that $1600? Well, we got that by looking at the number, the 71% successfully lived independently for 365 days. So what we do is we take, what is 71%? For simplicity's sake let's say that this program served 100 clients, and 71 out of 100 were successful in maintaining that measure of independence for one whole year. So to get our cost per success, we're going to take the cost of the program divided by the number of successful people. So what we typically think about when we think about cost per service, we think about a unit cost, that it cost us this much money to serve one person. Now, the problem with using that metric, and it's a fine metric to understand how much it takes to serve one person, but to use it in an outcomes way or to use it in a return on investment way is that you have nowhere to go but to do more with less. That's the only way you can be more efficient and decrease that cost per service, is serve more people for the same amount of money, or you can serve ‑‑ yes, so you can serve more people for the same amount of money or serve the same amount of people with less money. But if you look at the cost per success, the unsuccessful rate is built into that number. And so when you're reporting it, you're saying this is what it costs us currently to get to one successful outcome. Now, if you increase your success rates, you can now ‑‑ now what you're actually going to do is decrease the cost to get to one successful outcome. And so then when we looked at our research, then, how do we get to that ROI, we have to do a little bit of research. And for this particular case study, we looked at the annual average expenses to house one person in a nursing home for one year. So although you plight think $16,000 is expensive? Well, it's $19,000 less than what it would cost to house someone in a nursing home for a year. And so that's how you use the formula for your return on investment.

So to recap, if we want to start to talk about what is our ROI, what is our social return on investment, using our measurement framework to do this, there's three types of data points we need. First we need a clearly defined outcome measure. So we can measure things like increased independence or improved health or decreased recidivism. You get ‑‑ that's why we have our measurement frameworks. So we go to our measurement frameworks and decide what is that outcome we're measuring. Then we need to have a success rate. So the number of people who achieved success divided by the total number of people, and the total cost of the program. And if we have those three things, then we can start to talk about how much does it cost to get to one particular outcome.

One more story. I'm trying to throw a couple stories in here for you because they're really powerful. When organizations use their data in this way, they fully complete the measurement culture process and they have their framework and they start collecting the data and they start reporting on it, really amazing things happen.

So this particular organization, Western Youth Services, it's in Anaheim, California, and they were with youth experiencing adverse childhood experiences, and those who are really dealing with mental health issues. And so we worked with them to help them measure ‑‑ created their measurement framework, helped them quantify their impact, and we were able to create this interactive Excel worksheet that allows stakeholders to immediately test the impact and expected costs for a desirable outcome. And so we looked at changes in the assessment of youth functioning. So we looked at, okay, how many students increased their functioning as a result of this program? And this program was 68% successful. So you could argue, well, 68%, that's not very good. Or you can think, wow, that's great, 68% got better. And now they had a baseline. And what's really exciting is just knowing the percentage of youth who got better through their programs, the county, who was their major funder, started asking other communities, leaders, well, what's your success rate? And they didn't know. So just by having that data changed the conversation in other communities and made their organization automatically look more high performing because they knew their success rate. But what we were also able to do for them was to look at how much they saved the community because of this. And so we did the research. Like I said, we go and we do the research, and we found that if mental health is left untreated, what's the probability that this youth is going to experience a host of different problems? Medicaid costs, loss of income, incarceration, addiction services, and we found the cost of that. So we didn't assume that 100% of the youth were going to go have these negative outcomes, but we looked at the research and found, what was the probability, based in research, that this would happen, and what's the cost associated with that limited probability? And the conclusion was that this ‑‑ that these school‑based mental health services saved the community more than $31 million just in the schools that they were in at a 68% success rate. And because they were able to tell the story, they were able to raise the money to expand their programs, and now they're serving more kids in more communities having much greater impact.

And then one other example which I have already alluded to, which was our department of aging work where we were able to create the long‑term care savings calculator and look at if ‑‑ because the passport program monies, the monies that kept seniors in their own homes instead of moving into a nursing home was ‑‑ it was at risk of being defunded, and we used this same approach. We looked at outcomes. We looked at our data. What we found was that if we could just keep the passport program serving the same amount of people at the balanced ratio essentially as the rest of the states or the average state in the country, it would save the state $250 million in Medicaid, and because of that savings, the passport program's money was actually reinstated after it was cut out of the state budget. So when you can start to put ‑‑ quantify the value, public value, your social return on investment, to decision‑makers, it really can transform your organizations.

So I am going to pause there. We're going to turn it to Jeremy, who is going to have something to say because remember that the ‑‑ Jeremy Morris with the Ohio State wide Independent Living Council has created a measurement framework. They worked together across all the CILs and created their measurement framework, and now if you remember, if you have been on the first two webinars, you'll know that they ‑‑ they're still in the process of getting this standing up, but I'm just curious from you, Jeremy ‑‑ are you there?

>> JEREMY MORRIS: I am.

>> SHERI CHANEY JONES: Wonderful! So, I'm realizing that you haven't fully collected all data and had an opportunity to look at some of these metrics, but what efforts have you taken in terms of communicating your measurement framework and what successes have you experienced so far?

>> JEREMY MORRIS: And this is actually something that we really can speak to because this past year was a state budget year for Ohio, and as part of the Prof. zest, we looked at the lack of funding for the Centers for Independent Living, and our vocational rehab agency, they are very strong in their data and their metrics. And everyone in the state legislature knows that the director of the VR agency can give them a report, it's a nice chart that breaks down everything that they're doing, it shows their success, and everyone can understand it. So we were able to talk about what we've done through this process, highlight the measures we plan to implement, highlight the work we've done in this process, and we initially went to the VR director and talked with him about, okay, here's ‑‑ here's what the centers are hoping that they can achieve in the state budget. Here's the process that we want to take. And here's the measures that we are going to start collecting and reporting on. So that helped us with our VR agency and helped with that relationship because he now saw that we took the advice, really, that they had been suggesting for years that the Independent Living Centers and the way that we looked at things, we didn't have anything of really great value to report. So we weren't looked at as a valued partner because we didn't have anything that could prove that we had a very ‑‑ a very sound reason for existing. So when we took that and we were able to actually talk about that with legislators and say, look, here's what the centers are doing, and here's our plan for measuring our performance, here's our plan for how we are going to prove to you our true value, that was very well received. The fact that we came to them and said we have a plan that makes us accountable, that's going to show you what we're doing and is going to show you how well we're doing, that was ‑‑ that was one of the biggest things that we got a benefit out of that people ‑‑ they liked to see that we ‑‑ we were going to be using any funding that we got wisely and that we did have a plan to show, here's some true measures of the impact that we've had across the state. You.

>> SHERI CHANEY JONES: That's great. That's so encouraging and inspiring.

So, have you thought through yet ‑‑ once you actually start to collect the data, or maybe you have had an opportunity on some of the measures, not all of the measures, but have you thought through your plan for communication once the framework is implemented?

>> JEREMY MORRIS: Yes, and there's going to be a couple things that we do, because some of the things that we are going to start collecting we're going to work on building that into our state plan. So some of it is going to be used to help monitor our State Plan for Independent Living and help simplify the tracking of certain things for our state plan. But then we're also going to be able to use this for an annual report that really shows here's the statewide impacts that we have had and we'll be able to break that down per center so that the centers could use it within their communities and be able to show, look, here's what we're doing in our local region, here's the impacts that we're having in your community, and we as SILCs will be able to show here's the impact statewide, here's the big picture of why we really have a strong value in the state of Ohio.

>> SHERI CHANEY JONES: That's great. That's really great.

Does anybody else have questions for me and/or for Jeremy around using data to tell your story or calculating that social impact return on investment, or if there's any confusion about cost per success, or if you have any questions related to how would you measure this, I would love to answer those now for you. Feel free to put your question in the Q&A ‑‑ I don't know if we've gotten any questions yet, Paula.

>> PAULA McELWEE: We haven't yet, but I have a question.

>> SHERI CHANEY JONES: Okay.

>> PAULA McELWEE: While everybody else is typing theirs in. Maybe it's partly question and partly comment. I think we cannot emphasize enough how much more effective this is if anybody in the state does it together. And from state to state the relationship between centers varies, you know, and are there some outliers who don't really participate with everybody else. I would be curious, though, Jeremy, how did you bring everybody together? I think that's a valuable thing to know.

>> JEREMY MORRIS: So before we started this process, we actually had Sheri come in and present to all of the center directors. So she talked to them about the process, the value of this, and highlighted some of the things that she has on all three parts of this series. And we left it up to the centers to make the decision of, is this something that you guys would like to go forward with? If so, you have the SILC's backing. We will help ‑‑ we will help fund and get this off the ground and help coordinate it. But it was really getting that initial buy‑in of giving the centers the control of it and making sure that it's something they wanted to be a part of and that they saw value in it. So as we went through it, it was ‑‑ we had several meetings, and we made sure that there was at least one person from each center who was going to be at the table and that they ‑‑ each center had a voice in the process, because we also didn't want a larger center who has more resources and has more capacity to dominate the way that this was directed. We wanted this to really work for all centers across Ohio, no matter the size, no matter what their budget was. How could they work to implement this and could they see this working within their own center. So it was nice to have that feedback, but really bringing them all to the table and giving them control initially to say, yes, this is something that we would like to do, this is something that we see value in.

>> PAULA McELWEE: And you have some centers that are pretty small in addition to the larger ones. So it's great to see it across all of those sizes of centers.

Sheri, we have a question in the Q&A from Jerry Waco. Wee like to hear again the formula to determine the return on investment.

>> SHERI CHANEY JONES: Great. I'll go back to this slide to help highlight it. So with the social return on investment, and thank you for asking that question, because I did kind of answer the elements, but I don't know that I actually gave you the math. I will make a note that in ‑‑ as part of this webinar series, there is the workbook that goes along with it, and the actual equation, if you will, is in that workbook. So make sure that you reference that as well, because you'll see the actual, like, mathematical equation.

But conceptually for program‑wide to get the ROI here in this one, what we did was we looked at ‑‑ we took this 71% successfully lived independent for 365 days. So that was the outcome measure that we used to get to this 118 return on investment. So first what we had to do was we had to know how many ‑‑ we created that cost per success. So how many ‑‑ we took the total cost of the program and divided it by the number of successful people. And that's how we got to that $16,000. So the cost for success for the program to help these individuals live independently for 365 days was $16,000 to get one person to that 365‑day success rate.

Then what we did is we looked at what was the cost of an individual to the state to house them in a nursing home for 365 days? So it was 16,000 plus 19,000, so about $45,000 a year, and so that's where we get the $19,000 savings. And if you take kind of the difference between 45,000 minus 16,000 divided by 16,000, that's where you get that 118%. So that's the return on investment. I hope that makes sense. I would also encourage you to look at the workbook because that will give you the actual formula.

>> JEREMY MORRIS: I'll just add for the return on investment, something ‑‑ that was one thing that we were able to really key in on, because the centers work with ‑‑ they worked with the money follows the person program doing the nursing home transition. So we were able to see the average cost of a nursing home for a year versus the average cost of home and community‑based services, and it came up to 30,000 some dollar different as a savings per year per person. So we were able to take ‑‑ even though just one‑year cost savings across the 10 years that the centers did that program and show that there was over a $100 million that the centers helped save the state of Ohio in Medicaid spending from the work that they were doing.

>> PAULA McELWEE: That's really exciting.

Anybody else have a question before we go on to the next section? Type it in that Q&A box. You will find the tab for that at the bottom of the screen. And it will pop up for you.

>> SHERI CHANEY JONES: I just have another question for Jeremy and I'll move on. But was there any fear ‑‑ I know sometimes, especially if you're moving into this joint measurement framework where centers are willing to share their data, has there been, and if it hasn't been, I don't want to induce it now, but any fear about comparing centers and one center not looking as good as another? And if so, how are you dealt with that?

>> JEREMY MORRIS: It's something in some ways has come up, especially when we look at the size of some of the centers compared to the others, but that's when we really, as a collective, we talked about the fact that this isn't a tool for us to compare each other or to monitor the centers themselves. There isn't any of that that is built into why we wanted this. We wanted it so that we could really show that collective impact. It was really just reinforcing that that is the purpose of this. We want to know the collective impact. Because if the centers wanted to compare against each other, I mean, they could use their current 704 PPR data and do that as it is. So they already ‑‑ in a way they already had the tool if they wanted to just do that comparison one‑on‑one, but we really were reinforcing that that's not the purpose of this, and especially as a SILC. Our purpose was never to use this for any type of monitoring of what was going on within the centers. We just wanted to be able to really show the messaging of why there's such value in Independent Living in Ohio.

>> SHERI CHANEY JONES: That's great. Thank you for answering that question. Because I know we often get that ‑‑ we often get communities concerned about that or ‑‑ and it comes back to making sure that everyone understands that's not the purpose of this. It's not used for punitive reasons. I know we work with some communities where everyone has kind of an agreement in place that the data will only be reported in aggregate and we won't be comparing different centers to different places. So if that was an issue ‑‑ I know it wasn't necessarily for Ohio, but if you're finding that in your communities in other states, there are ways to make sure you can eliminate that fear. That's something that is going on.

>> JEREMY MORRIS: And I will just add real quick, we did have agreements that we made with etch a of the centers, and they were signed agreements that, you know, we could have access to the data as a collective to be able to show the impacts, but that the SILC would not use it for any purpose other than being able to show the collective impact and measure the performance against the State Plan for Independent Living, that we made that commitment right up front to the centers that were not ‑‑ we're not trying to use their data for any other purposes, and we don't want to have anyone thinking that that's the case. So we made sure that that was something we spelled out very clearly for everyone.

>> That's great. Thank you. I will go ahead and move on and talk about ‑‑ so the last C in the model to really create a high‑performing measurement culture doesn't stop with just communicating your results. It's also about, yes, using it to celebrate what's working, and then changing and innovating the things that are not working, and that is where this step 5 is where you get to strengthen your culture, and at the same time you get to create greater impact. So it's very important. Sometimes people think that this is implied, but often it's the most overlooked and it is the most important step to keep things going, to keep that measurement culture high. A lot of times we find, especially in collective impact initiatives, that it has been tried in the past, and people are kind of burnt out on it, and one of the reasons is because of ‑‑ well, there's a couple of reasons. One of the reasons is because getting that shared data collection, it doesn't happen overnight. It can be hard. It can be a bit messy. And the first year ‑‑ you know f a community implements this, the first year might not be perfect. And the first year maybe data quality or even ‑‑ you just find issues in the quality of the data or you don't really have everything you wanted. You had to overcome a lot of barriers which delayed things back. Maybe it's not great to publish yet. Maybe there's too many holes in it to really want to publish it and tell your story in a way that some of these examples that we already talked about.

And when that happens, there can be natural response to retreat and say, oh, it didn't work, we can't get it together. It didn't work. But I would encourage you to celebrate the success of the capacity building in that year. Don't publish the data if you don't feel they're of quality or worth publishing, but internally share that story. Share what the story could be, or could have been, if you had greater data quality. And so sometimes just celebrating the fact that, look, we've increased our capacity, and then communicating internally to what the story could be will drive better success the next year. I was working with one organization who really was having a hard time with some of their line staff putting the data in that they needed in order to tell their impact story, and the reason they were having problems doing this because for years no one looked at it. Staff was like nobody looks at it, nobody uses it. When I was able to go back to them ‑‑ so we just didn't feel like that was ‑‑ that was a good enough representation to, like, take that as fact and go publish it. But I still went back to that team and I said, hey, look, if we had had 80% data compliance, or a better representation, this is the story we could have told about your impact. And that really got their attention. And it increased and improved how they inputted the data going forward. It finally clicked if their brain, oh, it is important, someone is looking at it. So I encourage you to make sure that you use it.

So I talked about Western Youth Services and how they saved Anaheim ‑‑ or how they could show they were saving Anaheim $31 million more a year in community costs. And since that time ‑‑ actually I was just talking to their Executive Director yesterday ‑‑ they have raised nearly four more million dollars for their programs, and they're now scaling that program and training others how to implement their model. And so that's how ‑‑ like, that's what they're celebrating. Again, I told you ‑‑ I mean, 68% is good when you're dealing with a very difficult population, but even with less than 75% of their participants getting better, they're securing more money for their programs to be able to figure out how to improve it to scale it to train others how to do it. And so it really does work.

Now I want to give you this ‑‑ this is like the secret sauce to getting this measurement culture built within your state. So, we're all human. We all are humans and if you want to build a measurement culture in your organization or in your statewide system, just know that resistance to change exists, because we're all wired for that resistance. It's a natural trait. There's nothing wrong with any of us when we feel it. We're wired as humans to feel it. But the good news is that science has told us that there are three things that we can do as leaders to make sure that we set our systems up in order to overcome that resistance. So, first we need to have a dissatisfaction with how things are today. We need a vision of what is possible and the concrete first steps. And so if you like math like I do, the formula is D times V times F must be greater than R. And anything times zero is zero. So if we don't have all three of these things, resistance will always be ‑‑ will always be there and it will win and you will not be able to be successful at creating the culture that you want. And this is true, yes, when you're creating a measurement framework or implementing high performance measurement practices in your state but it's also true for anything else you want to do in your organization. So just consider this a bonus gift, this formula, to think about.

So if you think about these series of webinars, we have built in kind of giving you pieces of that. So dissatisfaction with how things are. In the first webinar, make sure to go back and visit the data around ‑‑ it's published in "Impact and Excellence" around organizations that create high performance measurement cultures are significantly more likely to raise more money, have greater impact, and have greater efficiencies. And only 25% of government nonprofit organizations have achieved that status of high performance. So that's the ‑‑ that's the dissatisfaction.

Part of that data, if you're trying to figure out how can I get my state on board? How can I convince others that this is something we want to do? Share that information. Start to dig and start to say, like, are we set up to have the resources that we need to have? So that's one way. Kind of explore that ‑‑ are things really as good as we think they should be.

Now, the vision of what is possible. Again, we have given you a lot of examples of what is possible. Jeremy has been so gracious to show you what's been possible for Ohio. From them making ‑‑ you know, going through this exercise and putting the framework in their places, and I have given you some other stories of success. So for you to know what is possible, what could your state do if it had more collaboration and communication and could share its collective impact? What would that mean for your state budget? What would that mean for those people you serve? What greater service and value could you provide? So get really clear on the vision. And then the concrete first steps we've given you. We've outlined kind of in the workbooks how to get started, how to create a logic model, how to select your measures, how to communicate your story and calculate your ROI after you've collected your measures. So we've tried to set you up for success as you take this information and implement it in your state.

This particular grow model, I encourage you to really think about. Because it's designed to move your state from a place of inaction to action. Actually, I use this model with a lot of my clients to get them to move to action. I also use it ‑‑ we use it in measurement resources business to get to our next goals all the time. So it's a really great formula for success. And so let's just for this ‑‑ for this exercise sake, let's think about the goal and by when. Let's say the goal is to create a measurement framework for your state. Let's say that's the goal. And let's say you want to get that finished ‑‑ we'll be generous. We'll give you a whole year. You want a measurement framework done by 12 months from today. So how you would use this framework is in order to overcome that resistance, in order to make sure that we understand what's going to get in our way and we uncover it, we're going to have the goal. Then what we need to do is we need to list all the supporting forces. So all of the things that are going to help you. Maybe it's that you want to have success like Ohio. Or you have others who are on board and would love to tell your state's collective impact. Or this training, you have the tools or the resources. Whatever it is, in your state n your system, the resources you have, what are those supporting forces that are going to help you get to succession? Then you're going to list all those restraining forces, all those forces on why it's not going to work. Maybe it's right now you don't have the collaboration or the coordination among your CILs in your state. Or maybe it's we don't have the time or we don't have the resources or we don't have a certain skill, we don't have the data. Whatever it is, just list all the restraining forces that are going to keep you from being successful. Then what we need to do is get to those concrete next steps. So if you look on this grow model and development planner, you'll see options what's next. So the goal in thinking about what are those concrete next steps is to minimize those restraining forces and maximize the supporting forces. So asking yourselves, well, what do we have to do next? So it could be as simple as do the exercises in this webinar. Or create a logic model for our organization. Or let's do a data audit to see what data we have in the state. Whatever it may be, look for funding. I don't know because every organization, every system, every state is going to be different but really kind of thinking through what is that thing that I can do in the next 30 to 60 days to move closer to having a measurement framework. And then you'll see that there's a rating, a ratings scale there, because everything has to be data driven. I also would encourage organizations when they think about that goal, so creating a high performing measurement framework for your state in the next 12 months, 1 is where are you today, and 10 is you're fulling living out your measurement framework. So assign yourself a number. The reason why that's important is because change, like moving a system from a place of not having something or not coordinated and not working together and not sharing data to one that is probably going to take some time. It's not going to happen overnight. But if you have this way to measure success, you'll see you might go from a 1 or 2 today and by 12 months you might be up at an 8 to a 10. So that's a way to measure progress when you're really trying to move big system changes forward.

So I give you that tool as a tool to really start to organize and think about, if this is something that resonates with your state and you want to give it a try, here's a framework to help you think about how you can move forward.

And so let's ‑‑ that's the main content that I have for our call today but I know we can learn so much from Jeremy, and we'll have lots of time for questions today.

So, Jeremy, given all the webinars and in totality and your experience and ‑‑ I know you're currently living it and you're currently overcoming challenges every single day, what advice would you give to other IL networks to developing and implementing a high performance measurement framework.

>> JEREMY MORRIS: I think, like I said earlier, it's that communication between everyone. A lot of this conversation did start with us talking about the lack of a consistent way to show what we're doing. You know, in the past we tried to map out things from the PPR data that the CILs had, and we realized that people outside of Independent Living didn't fully understand what we were presenting with. It just really didn't work out for us that we could consistently show what was being done. So kind of talking to what you had on the formula, we all saw that there was ‑‑ there was dissatisfaction in how we were reporting things. We didn't have anything strong happening across the network that we could really highlight on. So one of the centers worked with Sheri to implement this within their own center and really take a look at how they were doing things. So everyone saw that this was possible. Theirs is a larger scale than what we're doing as a statewide network. Theirs is a lot more details in some of the things they're doing because they customized it to just their own center. It was nice to see that this ‑‑ going through this we could be flexible in how we did it, and we saw a real‑life example of how much it could work, how we could work together, and how it could help us in removing one of the obstacles that we all agreed on. So it was finding that common ground that we all agreed we have a problem with the way we present our data and the way we present our information. And this became a potential solution for us to move forward. And we're excited for the possibilities that we have of looking at something and being able to say, like, you know, here's some real things that we can show now. So I think just having those ‑‑ those talks within your networks of what problems do you see. You know, it's starting offer with those conversations of what is it that everyone can agree is a problem? In the past we've had conversations that focused around ‑‑ purely around how much funding centers were getting, and we finally admitted every center in Ohio is underfunded very drastically. So let's remove that part from the equation and let's talk about some of the other issues we have. And the data issue was a consistent topic that we brought up.

>> SHERI CHANEY JONES: Great. So whether you knew it or not, you used the change formula. You talked about, what were you dissatisfied about, you used that one particular organization as a model of what could be and the vision, and then, you know, you had the resource to then you know what the concrete next steps were.

Any other advice that you would give?

>> JEREMY MORRIS: That's really one of the biggest ones, and I think that that's one that a lot of the networks, you know ‑‑ it's taking that first step of just having the conversation, and I think right now it's a really good time since we're all in the process of we have a new three‑year state plan that's going to be due. So this could be a conversation that you build in of, you know, you may not have the goal of implementing a new framework within your three‑year state plan, but are there things that you guys can start looking at to incorporate into your state plan? And it really helps bring the network together. It helps start collaboration between the centers. And, it's just having that routine communication. We now have a group that's going to be working, and we have individuals from each center that it's not the directors. It's individuals that are working with the data, working with consumers that they're going to have, I think, a little bit more insight into some of the things because they're the ones doing some of the data entry. They are the ones who are looking at certain things. So as we start getting the data that comes through, I've told that group, you know, this is going to be ‑‑ this is going to be your project. I'm going to help facilitate it but I really want to put you guys in the lead here of looking at where do we need to make improvements? What is it that we need to do? Is there some training that everyone could benefit from across the network? So I think it's going to help us pull everyone in stronger together by everyone recognizing there are ‑‑ there are gaps that we need to fill. There are certain things that we need to work more efficiently and do better with.

>> SHERI CHANEY JONES: Great. I really appreciate your ‑‑ just your honesty and your opening up to how you're thinking about leadership moving forward and how you handle leadership in the past. That's really encouraging, very generous of you.

Paula, do we have any other questions?

>> PAULA McELWEE: We do. This question has to do with your messaging. What messaging have you used with those who say that you have segregated cost savings to one outcome and not balanced that with the increased public cost generated when the CILs help individuals access to public benefits that they've not previously received? So I think what they're saying is one of the things we do is information and referral to public benefits, and is that not taken into consideration here?

>> JEREMY MORRIS: Well, I think ‑‑

>> SHERI CHANEY JONES: Go ahead, Jeremy, then I'll follow on.

>> JEREMY MORRIS: I was just going to see even with our example of the nursing home transition, we talk about here is the average cost of the home and community‑based services in Ohio, and that comes up to around $35,000 a year. But when you compare that to the $65,000 of a nursing home cost, or other institutional costs, even though there is an average cost data that we're looking at, yes, there is ‑‑ you know, it's shifting of funds from one place to another, but when you compare it to that alternative of the more expensive, we're still able to show a very significant cost savings, and I think that's where sometimes we need to continue looking forward, like the information and referral, if, say, through a follow‑up you're able to say ‑‑ if the inform ‑‑ the information and referral we provided to you, if that helped keep you in your current situation and not have to go to an institutional setting, could you then factor in that cost savings as well?

>> SHERI CHANEY JONES: Absolutely. And we've worked in other communities where we kind of balanced that out. So if you wanted to look at, yes, maybe this particular program is a cost to the state, but when you balance out the savings over here, you could still show that the totality of your work is a savings to the state, and that's one way to look at it as well, is that kind of ‑‑ you can always adjust that ROI if you will. Like, we've done ‑‑ sometimes those ROIs, that percentage can get just ridiculous. Like 57,777%, and you can always adjust that down if you want to be more conservative in your estimate. If you recognize that, look, we are increasing the cost to the state because we are moving people on to this benefit, this public benefit that they didn't receive it before, but over here where we're reducing costs to the state because we're maybe keeping people in their homes so they're not moving into institutional care. Or maybe even it's stabilizing them so they're not revolving ‑‑ and you have to think about who is that audience you are talking to. Because we have seen community programs look at community cost in terms of hospital readmissions or other savings to ‑‑ I think I remember helping one community think about what is the employment savings? You don't have a caregiver who is calling off work to go ‑‑ you know, go and help their family who needs this help. And so what is that savings to the employer, to the community? So you can always think about how to offset those costs and go back to ‑‑ again, I always go back to that five why's to understand how you want to create that ratio, but that's a really great question.

Any other questions?

>> PAULA McELWEE: Any other questions go ahead and type them in here or let us know.

That's all the questions that we have that are on the Q&A, though.

>> SHERI CHANEY JONES: Okay. I have a few more slides, and then ‑‑ so if you have a question and you're thinking about it, make sure you type it in right now. But make sure ‑‑ I understand I'm trying to talk about math on a webinar, and that can be kind of daunting sometimes. So make sure you go back to that program workbook and work through the social return on investment Activity 7, and do the moving to action ‑‑ do your own grow planner, do your own development planner in terms of what would it look like ‑‑ what are those restraining forces, what are those supporting forces that are keeping your ‑‑ that are going to help your organization that are keeping you stuck to implementing this in your communities, in your state? So those are two activities to really take this webinar information and put it to action. And I want ‑‑ I want to close this out with a very inspirational thought. So for those of you on the phone or you're unable to see the screen, I have a photo here of a man pushing a ‑‑ well, some may think it looks like a man is pushing a boy off a boathouse into a Lake. But the reality of this photo is that it is not ‑‑ it looks like that way, but that's not the reality. Maybe you feel that way. Maybe you feel like your funders are pushing you, especially with pay for performance contracts going out into the world and there is more focus on outcomes, and prove your value, and all this shift that's been happening. So maybe you feel like your funders and your communities are pushing you in towards having to create these measurement cultures or having to demonstrate your outcomes. But the reality of this photo is my husband ‑‑ that is my husband and my then 3‑year‑old son, he is he out in 13 and a competitive swimmer so this story makes more sense. At that time my son had seen older boys jump off this boathouse, and he really wanted to do it. And so he asked us, please, please, please, can I jump off the boathouse. We were really hesitant. I don't know. You're so little. But we knew that he knew how to swim, and he was wearing a life jacket, and the ‑‑ the most important thing is he wanted to do it. He was so excited, and we didn't want to kind of damper his spirit in that excitement for adventure, and so the reason the photo is priceless is because there's boat motor kind of sticking out beyond the boathouse, and we wanted to make sure his little legs would clear the boathouse. So my husband held him out over the boathouse, and he said, "dad, I'm ready," and he dropped in. So I want you to be like my son. I want to leave you with that motivation, that know what it can do for your state, for your community, for those that you serve to really jump into the waters of high performance, and I thank you so much for going on this journey, and I thank the IL net for the opportunity to present to you. I thank you, Jeremy, for really being transparent and sharing your story, and I thank Paula for facilitating these webinars. And so that is how I want to leave you. But, of course, we have some time if there were any final questions or thoughts.

>> PAULA McELWEE: Sheri, we certainly want to thank you for presenting some very thought‑provoking and, I think, energizing in a lot of ways information, that if we grabbed hold of this and go, we can show how effective centers are, and sometimes we have not made that point. So this gives us a solid framework for making that point.

The link to get to that webinar series and the workbook is listed there for you in the chat box. It doesn't look like we have any other questions at this time. So I think we can wrap up. Directly following the webinar you will see that evaluation survey to complete on your screen. We ask that you do that, and thank you again, Sheri and Jeremy, for all that you have shared with us.

>> SHERI CHANEY JONES: Thank you so much.

>> PAULA McELWEE: All right. That's it for today, everybody. So, bye.