



SYSTEMS FOR TRACKING AND VERIFYING OUTCOMES

For reporting to stakeholders as well as for making the case for funding for effective resident services, it is critical for organizations to track both the outcomes of families and children served by resident services programs as well as the performance of the property. This can be done through a dozen key indicators of success (as discussed earlier in the Design Process section). Organizations have several options for implementing tracking systems, including software applications designed for this purpose, such as Efforts to Outcomes or AASC Online, or it can be customized with a spreadsheet application, such as Microsoft[®] Excel. Enterprise has developed such a tool, and an introduction to that tool can be found in the Service Referral and Outcome Management section of this manual. The tool itself can be downloaded and customized from the online version of this manual, which is available at www.enterprisecommunity.org/resources. However, with a little time and a basic understanding of the software, an organization can design its own outcome-tracking spreadsheet.

In the case of most resident service programs, a combination of on-site programs and referrals to off-site agencies and programs address residents' service needs. In most cases, referrals are coordinated with the off-site agency, and it is beneficial to outline the terms of this relationship in a formal document, such as a contract or a memorandum of understanding. Outcomes-tracking protocol should always be a part of that memorandum. However, regardless of which entity is responsible for officially tracking referrals and outcomes, resident services coordinators should collect at a minimum the following information when processing a resident's request or referral:

- Resident identification
- Resident request or goal
- Assistance or referral details
- Referral agency name and contact information
- Date referred
- Referral outcome and date

To be sure, a wider array of information will be necessary when attempting to analyze programs, outcomes, agency performance and other factors important to your organization and funders. However, this is only a baseline list, and more extensive collection information can be found in the Service Referral and Outcome Management section of this manual.

When developing your systems, first decide what should be tracked. Determine the information necessary to measure the success of your program or your partner agencies' programs. Once this is determined, the type of system to use depends upon how detailed the tracking needs to be. If a program involves multiple resident services coordinators working at different properties and includes multiple on-site programs, specialized outcome-tracking software may be ideal. However, if the program is relatively small and cost is a strong consideration, then a spreadsheet tool will probably be the best solution.

Spreadsheet Tracking Tools

Tools like Microsoft's Excel are advanced computer-based spreadsheet applications that combine power and flexibility with ease of use. The greatest advantage of using any computer-based spreadsheet tool, as opposed to collecting data with pen and paper, is that such applications are specifically designed to manipulate data, and therefore allow users to change, update and reconfigure information in ways paper filing does not allow. Excel can hold more than 65,000 rows and 250 columns of data within a worksheet. Although there is room for a lot of data, one should be mindful that spreadsheet applications are not designed to be used as repositories for very large and complex data sets; in such instances, a database application is preferred.

As a tool for manipulating data, Excel uses special commands, known as functions, to quickly perform calculations. With several mathematical, statistical and financial categories to choose from, functions extend the power of Excel and can be used to make complex operations extremely simple. Moreover, using this feature is essential when analyzing data. Finally, once the data have been aggregated, Excel offers myriad choices for quickly representing key information graphically, making it easier to report on outcomes to your organization, funders and other stakeholders.

When tracking data, you must establish protocols for data collection to ensure that all members of the staff are using the same terminology to describe the same things. Such uniformity is achieved through "drop-down lists" that are unique to columns of information. By standardizing the categories of assistance and the types of data collected, you can easily create graphic representations of the data for reporting purposes.

NeighborWorks America has Excel-based tools for tracking attendance and school-grade improvements in after-school programs available on the website of its Multifamily Initiative at

<http://www.nw.org/network/neighborworksprogs/multifamily/learningcenters/lcTools.asp>

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Specialized Outcomes-Tracking Software

Enterprise Community Partners, Inc. and NeighborWorks America worked with the American Association of Service Coordinators (AASC) in 2006 to design new software for resident services coordinators and managers to track services and outcomes for

families living in affordable housing. The new software was collaboratively developed by AASC and the Pangea Foundation and is adapted from software already available for seniors through www.AASCOOnline.org. AASCOOnline-Family is Web based, so multiple staff can enter or review data at the same time, efficiently and effectively. It manages data for tracking and reporting outcomes. For more information about how this software works and to purchase AASCOOnline-Families, go to www.aascfamilies.org.

Another software program that has been available for several years is the Web-based software called Efforts-to-Outcomes, created by Social Solutions. More information about this software is available at www.socialsolutions.com. Like AASCOOnline-Family, it can also be used to track group program participation as well as demographics and resident employment and education status.

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