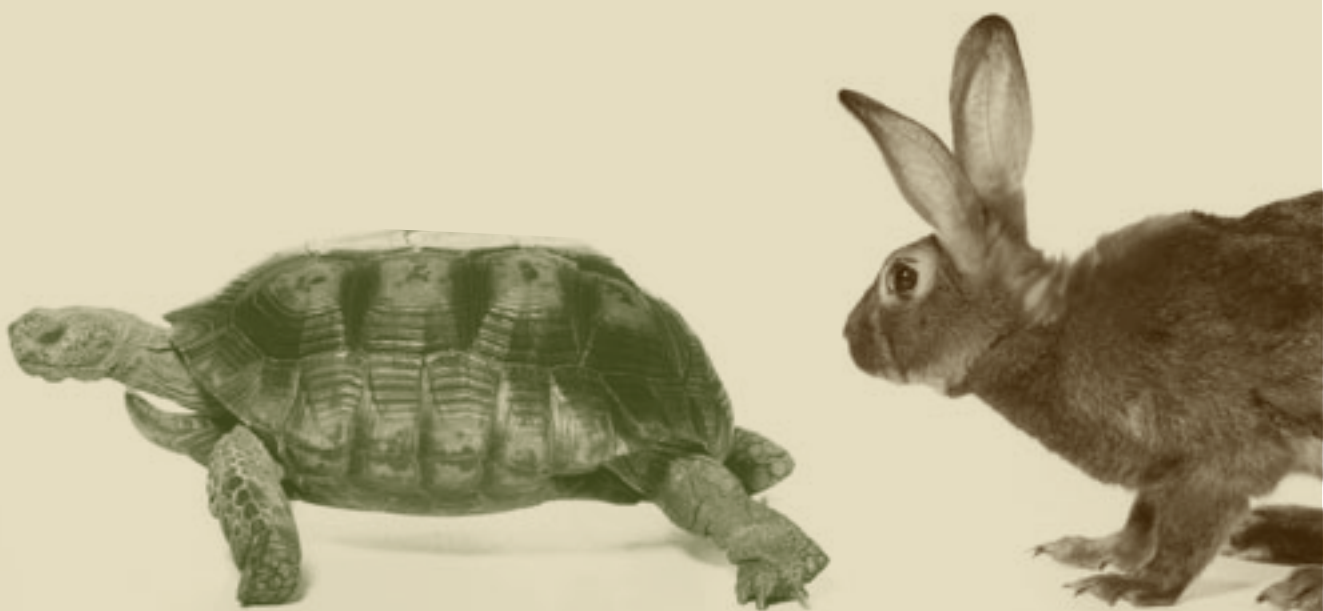


# Good Stories Aren't Enough:

Becoming  
Outcomes-Driven in  
Workforce  
Development

Martha A. Miles



A PUBLICATION OF PUBLIC/PRIVATE VENTURES

Working  
**Ventures**

# Good Stories Aren't

**Enough:** Becoming  
Outcomes-Driven in  
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Development

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# P/PV

Public/Private Ventures is a national nonprofit organization that seeks to improve the effectiveness of social policies and programs. P/PV designs, tests and studies initiatives that increase supports, skills and opportunities of residents of low-income communities; works with policymakers to see that the lessons and evidence produced are reflected in policy; and provides training, technical assistance and learning opportunities to practitioners based on documented effective practices.

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Working Ventures seeks to improve the performance of the workforce development field by providing practitioners and policymakers with the knowledge and tools needed to operate effective employment programs. We support the field by documenting effective employment strategies and practices, convening practitioner workshops and providing resources to encourage program innovation.

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# A

*t Towards Employment in Cleveland, a woman from a local credit-counseling agency leads a group discussion with 20 job seekers, posting ideas on a flip chart. Mostly single moms, the group laughs as they share hints about making it on a shoestring family budget. On the wall are a series of inspirational posters, along with the “attendance racetrack.” Each woman’s name is posted on the track to mark the number of days she has attended. This is Day Four—a Thursday—in Towards Employment’s two-week job readiness training; it’s also the day that staff say is the most strategic for featuring guest speakers.*

Towards Employment's staff discovered via their participant database that Thursday was the day when people were most likely to drop out of the training. Staff reasoned that having a speaker might provide added incentive to attend, ultimately increasing the percentage of clients who complete the program. They established a regular time slot on Thursday mornings and invited a variety of speakers, including area employers, successful graduates, advisors from the local community college and counselors on domestic violence. Participants enjoyed the change of pace, and it has helped keep attendance rates stable. They are now looking at the impact of other factors on attendance, like serving "harder to place" job seekers and larger class sizes.

Program completion is just one of the outcomes that Towards Employment's board and staff monitor on a quarterly basis; they also track program enrollments, job placement rates, average entry wage, job retention at six months and the cost per placement. The staff use their database to collect and analyze information related to these outcomes. They meet weekly to discuss what their data are telling them. And their findings inform program development.

But it wasn't always so. Hiring an executive director who came from the corporate sector and was used to focusing on bottom-line results helped. And in the late 1990s, as local public funders moved to performance-based contracts, Towards Employment's efforts to use data more effectively—and to become more "outcomes-driven" as an organization—gained momentum.

## The Culture of “Continuous Improvement”

For many years, in businesses and government agencies, quality-improvement initiatives have compelled employees at all levels to use data to improve their operations. Continuous improvement gurus have made millions helping companies respond to complex and changing environments by becoming “learning organizations” with employees who are “knowledge managers.” The goal for these organizations is often to adopt a broad culture of continuous improvement—a culture that provides tools for monitoring and improving performance and adapting to different circumstances and different customers’ needs over time.

Walk into many modern manufacturing plants, and it’s easy to see the signs of a continuous improvement culture. At an aerospace factory in Texas, each work unit has a performance bulletin board prominently displayed for all to see, with charts and bar graphs indicating progress on key goals for the year. In another part of the country, a leading paper goods company compares data across its plants, focusing on rejection rates, customer satisfaction levels, on-time deliveries and cost per unit produced; when a plant lags behind in any of these measures, management can investigate possible contributing factors, such as high employee turnover.

The public sector has long focused on measuring performance outcomes for various social service initiatives, including workforce development. The trend began with

the performance-based contracts of the Job Training Partnership Act in the 1980s. More recently, the Department of Labor has worked with regions and local areas to examine factors that affect performance on certain outcomes measures and to help apply that learning to improve service-delivery strategies.

The philanthropic community has also embraced the continuous improvement model, with an increasing emphasis on identifying desired long- and short-term outcomes for programs. Several foundations that fund workforce development organizations have noted the culture change needed for outcomes measurement systems to be effective: The James Irvine Foundation describes it as “creating a culture of inquiry” in which program decisions are based on an analysis of key outcomes. The Roberts Economic Development Fund notes that as staff create and use a data system, increasing communication between program “silos” is as important as the system itself.

In the nonprofit world, the continuous improvement ethos is commonly expressed through the promotion of “outcomes-driven” programs and policies. Unfortunately, for many workforce development organizations, the phrase “being outcomes-driven” conjures up images of staff scrambling to meet grant report deadlines, furiously pulling numbers from files and spreadsheets. In these cases, tracking and reporting program outcomes is the domain of executive directors, managers and the resident MIS “geek,” as they spend hours or days producing information

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## Moving Toward a Culture of Continuous Improvement

Basic paradigm shifts are often required as organizations move from traditional, fragmented communication to a model in which all staff participate actively in sharing and analyzing data to improve performance.

From	To
• Data collected for external reports	• Data for internal improvement
• Data as a burden	• Data as a useful tool
• Only the manager knows that	• Knowledge sharing across staff
• Culture of blame and excuses	• Culture of shared accountability
• Functional or program “silos”	• Cross-functional teams
• “That doesn’t have anything to do with my job!”	• “How can I help us reach our team goal?”
• Fear of breaking rules and patterns	• Support for making mistakes and trying new strategies

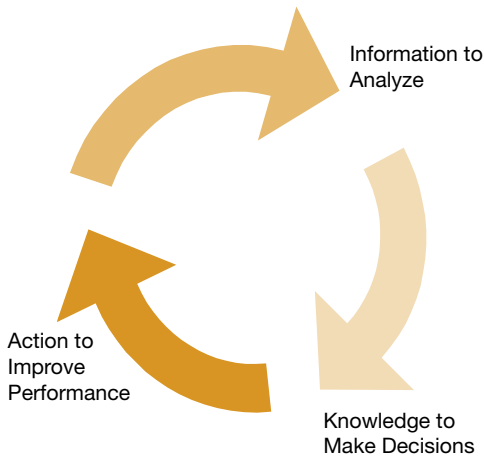
*Adapted from: Hackett, Brian, 2000. Beyond Knowledge Management: New Ways to Work and Learn. The Conference Board.*

in the formats required for reports to funders—which they hope will justify the ongoing investment of resources.

It has often been this motivation—to produce outcomes data for external funders—that has led workforce development programs to upgrade their information-tracking systems. And why not? More and more, government and private funders tie funding to demonstrable performance goals that include skill certifications, employment, long-term job retention and wage gains. With resources shrinking and competition increasing, the stakes are extremely high for practitioners when it comes to reporting program outcomes. “Good stories” of participant success—*anecdotal evidence*—are no longer enough to justify continued investment.

But what would it look like if being “outcomes-driven” also meant creating an internal culture that supports using data to improve practice? Can nonprofit organizations move beyond collecting and churning data in ways demanded by funders and embrace the culture of continuous improvement that so many businesses have nurtured? Increasingly, workforce development practitioners understand that being outcomes-driven is not just a requirement for continued funding. It is central to accomplishing their mission of effective service to job seekers and employers. Thus, beyond what is required by funders, many organizations are looking for more than “good stories” to help them manage and improve their programs.

Figure 1  
**An Ongoing Cycle that Improves Performance**



In response to practitioners' requests for information and guidance, P/PV set out to identify organizations making significant strides toward becoming "outcomes-driven." We conducted a reconnaissance of effective strategies, developed a series of workshops aimed at helping organizations use data more effectively and started recording the lessons learned. We zeroed in on a group of organizations that have learned to share information between levels, share planning among various departments and functional silos, and share responsibility for common goals. Staff in these organizations see data collection as critical for identifying performance "gaps" in need of attention—not simply as an extra burden at the top of a full to-do list. And data have become an essential component of these organizations' individual performance evaluations. Programs and their positions are sustained or dropped on the basis of performance

## Chrysalis

Los Angeles, CA

Chrysalis offers training and employment services to more than 2,000 economically disadvantaged and homeless individuals each year. The program centers on job readiness classes and support groups, a wide variety of job search resources and one-on-one case management. Clients with the greatest barriers to employment have the opportunity to develop their employability through Chrysalis Enterprises, a full-service staffing agency that contracts with local businesses for temporary and permanent positions, and a professional street-maintenance service that provides apprenticeships for homeless participants.

### *Becoming outcomes-driven:*

Chrysalis staff customized a proprietary system, ClieTrack, to meet their needs. They analyzed information about people who attended their program orientation and compared those who did and did not enroll in their job readiness workshop to see what they could learn about recruitment strategies and consider related changes in the orientation process.

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## The HOPE Program

### Brooklyn, NY

The HOPE Program in downtown Brooklyn serves approximately 600 people per year, with 20 staff members and a four-phase program that includes job readiness training, work internships, job placement and ongoing job retention and advancement support.

#### *Becoming outcomes-driven:*

HOPE always had a strong “research” element. After years of outsourcing data analysis, HOPE brought the function in house and designed its own Access database. Staff used their data to determine that participants’ employment outcomes correlated with the number of case management services they received. Based on that information, they turned a part-time benefits specialist position into a full-time post.

measures ranging from placement rates to average wages. Initially, this approach can be difficult for staff, but increased accountability often comes with increased flexibility and support, as managers encourage the use of data to try out new approaches. The whole team then monitors the effect of these changes, measuring their impact on performance.

The organizations we studied have regular cycles of analysis, reflection and informed action (see Figure 1 on page 5). They consistently question their data: What’s working? For whom? How does that compare with this other group? They discuss their data with staff at all levels, trying to better understand the story it is telling. They look for new knowledge about what factors could be enhancing or blocking performance. Using that information, they decide on specific actions and look to see what new data those actions will produce over time. Eventually, the new data stimulate fresh questions, and the cycle continues.

So, how can organizations get started with this approach? How can they institutionalize an ongoing cycle of analysis, reflection and action? How can they genuinely adopt a culture of continuous improvement? This report seeks to answer these questions by examining the experiences of six nonprofit workforce development organizations and presenting the strategies they have found to be effective. Each organization has worked hard to become more “outcomes-driven.” In most cases, this has entailed a long learning process. Starting with a variety of specific goals and applying different technological

approaches, each organization found ways to use data to improve performance.

### **The Challenges of Technology, Reporting and Staff Buy-In**

All six of the organizations studied in this report first approached becoming outcomes-driven by installing more efficient systems for storing and accessing participant information. They all used consultants to help them develop new databases. Some relied on publicly available software like Access or Lotus Notes, some used proprietary software that they purchased and customized, and some used systems that are maintained and customized by a third-party vendor.

Just putting a new system in place—usually in tandem with installing more computers and overhauling the network—brought clear benefits to each organization. One program director recalls learning that when a local funder's computer system crashed, her organization was one of the lucky few that didn't have to scramble to re-create performance data. New systems can make staff members' lives easier. Staff can access and update case-note information whenever they talk to a participant. "We're no longer entering the same data on three different forms," says Walter Ginn, Towards Employment's executive director. "It's a huge increase in efficiency."

Having participant data easily accessible also increases staff's ability to be "respectful" of participants and their histories by not asking the same questions over and over.

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### **Jewish Vocational Service (JVS)**

San Francisco, CA

JVS places 750 to 1,000 job seekers each year, including youth and adults with disabilities, immigrants and refugees, and welfare recipients. In addition, JVS provides occupational skills training in targeted industries and Vocational English as a Second Language.

#### *Becoming outcomes-driven:*

JVS maintained a large database with information about participants and more than 10,000 employers. Staff used it to assess the level at which different support services were utilized and to identify employers who were most engaged in the program as volunteers, financial backers or board members. The data helped staff focus their relationship-building efforts on particular employers and sectors.

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## **STRIVE/Chicago**

### Chicago, IL

STRIVE/Chicago is a program of Harborquest (formerly Suburban Job-Link Corporation), and serves approximately 100 chronically unemployed adults per year in a four-week job readiness program. Participants include many TANF recipients, people with criminal histories, and individuals with low education levels. In addition to job readiness training, STRIVE staff also provide job development services and follow-up after program completion.

#### *Becoming outcomes-driven:*

Committed to long-term intensive follow-up for graduates, STRIVE staff analyzed data showing lower-than-expected wage gains after two years on the job. This knowledge was the major impetus to starting Career Path, a program that helps graduates develop plans for additional employment, education and training to advance into higher-paying positions. STRIVE moved from a local Microsoft Access database to a national web-based database maintained by a third-party vendor, as it sought to understand what was happening with performance across many sites.

And, given the reality of staff turnover, information systems help preserve institutional memory. “Now, I’m not so dependent on employer information that was only in our last job developer’s head,” says one director.

But even with the benefits of upgraded technology, there are significant internal and external challenges. Service providers are often forced to enter data into multiple databases maintained by state or local funders—and separate from providers’ own efforts to maintain the same data in-house. These requirements for double or triple data entry can strain already overloaded staff, and maintaining the internal database sometimes becomes the lowest priority. Even though significant time and resources are spent responding to various external requests, it is often difficult to get summary reports or analyzed data back from funders—information that could help local providers see trends in their performance while there is still time to make midcourse adjustments. Finding and maintaining a database with the flexibility to easily generate reports—when reporting needs are constantly changing—becomes critical.

Internally, the challenges tend to relate to training and staff buy-in. It takes time and new processes to be confident that staff are entering data that are accurate and complete. Developing a culture of continuous improvement happens day by day, individual by individual. According to one manager, “You have to get frontline staff involved and invested in the data process. It

takes time, and you'll have to live through some difficult transitions. But you will get such critical information in return that it is worth the hassle." Part of that hassle is the steep learning curve that many staff have with new technology. The process can be painful, and on some days it may be enough just to say that the system is up and running.

Even after learning about a new system, staff members may see analyzing data as the province of trained evaluators—the “numbers people”—and not themselves. The fear of appearing inept—at math, at using the computer, at being analytical—can cause staff to shy away from doing anything more than basic data entry. But managers can support staff in developing a genuine understanding of the process and a sense of ownership of the new system.

An even deeper challenge is one of organizational and staff identity. Workforce development organizations are people-centered, and their staff are usually involved because of a strong desire to make a difference in participants' lives. Numbers and statistics can seem like the opposite of “personal,” and it will always be easier to put client interactions ahead of data entry. Furthermore, holding frontline staff accountable to employment or skill-gain outcomes can be frustrating for them, because those numbers don't necessarily reflect other—but more qualitative—progress in participants' lives. The challenge is helping staff see that data and service are bound together, because the information

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## Towards Employment

Cleveland, OH

Towards Employment serves nearly 4,000 people each year. The program provides a two-week job readiness workshop, direct placement services for participants and retention assistance at employer sites for six months, as well as assistance with child care, health care, transportation, uniforms, housing, etc.

### *Becoming outcomes-driven:*

To keep track of all of its clients, Towards Employment created its own system, located on all workstations and a local server. Changes that staff made to client data were synched with the server and other workstations on a regular basis. The database was also accessible via laptops that case managers used when they went out in the field. Towards Employment's Achieve program was part of a data analysis project funded by the US Department of Health and Human Services, wherein staff evaluated turnover and retention data for participants placed with health care employers to determine the effectiveness of the support services provided.

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**Training, Inc.****Indianapolis, IN**

Training, Inc.—Indianapolis serves 175 low-income adults per year in three-month administrative office, medical office, and logistics training programs. It provides extensive placement and job retention assistance, as well as individualized counseling and referrals for personal issues.

***Becoming outcomes-driven:***

Staff had regular performance conferences with participants, using information from their database, which tracked skill gains and feedback from employer internships. When an analysis of keyboarding speeds before and after training showed that increases were not sufficient to meet job market demands, staff looked at possible reasons why. After making changes in their testing procedures to better simulate employer practice and increasing the frequency of testing, they saw significant increases in skill levels.

from the numbers will help to improve services. As one manager describes it, “My staff know that when I focus on their numbers I’m sharing their passion.”

Thus, in the following pages, as we describe key strategies for becoming outcomes-driven, we often focus on ways to involve and engage staff. Whether it’s in choosing the data to collect, analyzing that information as a group, brainstorming important questions or implementing new processes, organizations that involve all levels of staff are most likely to succeed with an outcomes-driven approach.

**Five Strategies for Becoming Outcomes-Driven**

This report looks closely at the experiences of the six organizations profiled in text boxes throughout this chapter. In the course of our research, we asked how these organizations helped staff move from seeing data collection and analysis as a burden to seeing it as an essential tool for serving job seekers and employers and competing for scarce resources. We examined practices that helped staff feel more confident about working with data and perceive it to be a valued activity for the organization. From their experiences and insights, we distilled five core strategies that begin to address the challenge of becoming outcomes-driven: 1) focus on the data that matter to you; 2) nurture the “inquisitive mind”; 3) help staff experience the benefits

of using data; 4) build systems to enhance data quality; and 5) invest continuously in the technology.

In the pages that follow, we examine these five strategies in detail (with one chapter devoted to each). We describe specific tools and practices that organizations have implemented, from small-scale steps in the right direction to larger, more systematic changes. Our hope is that the report will provide a roadmap for organizations seeking to become more outcomes-driven. Faced with tight resources and increasingly complex job seeker challenges, it is critical for workforce development organizations to use their outcomes data to know which strategies are working, which may not be and what mid-course corrections they may need to make.

# Focus on the Data that Matter (To You)

Perhaps the most important part of becoming outcomes-driven is defining the data that matter to an organization. As with the other strategies outlined in this report, it is crucial that staff be involved in this process from the beginning. Specific relevant outcomes should be agreed upon by staff internally—not simply ordained by funders. As one program manager notes, “There’s a big difference between being outcomes-driven in terms of funder goals and staff committing to goals they want to see themselves.” Certainly, keeping funders happy will drive data collection and report design to some extent, but the primary motivation needs to be internal.

The organizations we spoke with engaged staff at many levels to identify the data that mattered to them. The first question often centers on an organization’s fundamental goals. “We are an employer-driven program,” says Abby Snay, executive director of JVS in San Francisco. “Why wouldn’t we want the same information as a business would about what our customers want and how well we are delivering the product? Our mission is to raise participants’ wage levels and self-sufficiency. We really need to know: Are we doing that?”

By focusing on their organization’s fundamental goals, staff can identify a number of “dashboard indicators” and the related interim milestones that help define successful performance.

## Establish Dashboard Indicators

Just as the dashboard in a car has quick, easy indicators that get one’s attention if there’s a problem (with speed, engine, fuel, etc.), some organizations use “dashboard indicators” in “driving” their program practice. These indicators may include the usual suspects—job placement and retention—but they can also consist of other important measures, such as participant wage gains over time, customer-satisfaction ratings, cost per placement or increases in revenue streams. The common element among all dashboard indicators is that they give an immediate, broad sense of how an organization is doing in meeting its basic goals.

Because too much information can be confusing, it is important that dashboard indicators be organized in straightforward,

easily accessible formats. One example is JVS' "scorecard" system. Faced with collecting many different kinds of data for different funders, JVS was encouraged by one of its private-sector board members to use a business concept, the "balanced scorecard," to keep focused on key outcomes and important internal processes. Originally described in an article in the *Harvard Business Review* by Robert Kaplan and David Norton, the balanced scorecard helps organizations measure success by more than just financial bottom lines.<sup>1</sup> It monitors factors such as customer satisfaction, staff training levels and internal process activities that could influence future performance. Each person or department focuses on the same core organizational indicators and then identifies others that are more specialized to their function.

Applying this concept, JVS established a yearly planning process in which staff and board members designed a performance scorecard for the organization. The scorecard indicators drove team plans, individual objectives and overall performance evaluation. Although the entire scorecard included close to 60 measures, there were just 12 that served as dashboard indicators. Among other outcomes, JVS tracked 90-day job retention and skill attainment across all of its different employment programs. Program managers discussed the scorecard with staff on a quarterly basis. They say the focus on an agency-wide scorecard helped to avoid "tunnel vision" for staff working on just one contract.

STRIVE National also had a simple list of nine core indicators. These included long-term measurements (for example, two-year retention rates) and short-term data (such as starting-wage rates). Each of STRIVE's affiliates submitted data on the same indicators as part of a quarterly report, which was then compiled by STRIVE National and circulated to all sites. These indicators became an important tool for shaping discussions among site leaders—they helped identify issues for national attention and topics for staff-development events. For example, when it became evident that a number of affiliates were experiencing "excess capacity" by not enrolling enough participants, STRIVE made it a national priority to upgrade recruitment processes and outcomes. Those numbers soon began to increase.

Of course, core indicators are meaningless without some way to put them in context: comparisons with contract goals, program-year objectives, the previous year's outcomes or outcome data from peers in the field. In his dashboard indicator report, Walter Ginn of Towards Employment used such comparisons, along with a color system to help staff and board members know which indicators need attention. An indicator highlighted in green meant it was "on track." Yellow highlighting meant "careful: watch this closely," and indicators highlighted in red required "immediate action." Ginn's indicator reports also included brief comments about factors that may have caused changes in performance.

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## Dashboard Indicators of Program Performance

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### JVS-San Francisco

- Percentage of available program capacity filled (outreach)
- Number of job placements secured
- Percentage of completers attaining training-related placements
- Average wage at placement
- Percentage of placed clients employed at 12 months
- Average earnings change at 12 months post-placement
- Percentage of students who demonstrate skill gains in pre- and post-tests
- Percentage of budgeted contract/grant revenue actually earned
- Actual net income at fiscal year end
- Percentage change in unrestricted or donated revenue
- Average percentage of stakeholders who express satisfaction with services (clients, employers, staff, volunteers)
- Percentage change in staff-vacancy rate

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### STRIVE National

- Number of clients who attend first day of training
- Number of clients who complete basic job readiness program
- Number of clients who start a job
- Average starting wage
- Placement rate within 12 months of graduation
- One-year retention rate
- One-year pay rate
- Two-year retention rate
- Two-year pay rate

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### Towards Employment

- Number of referred clients who actually start job readiness workshop
- Number of clients who complete job readiness workshop
- Percentage of clients placed
- Percentage of placed clients retained at 30, 90 and 180 days
- Average wage at placement
- Average days required to deliver follow-up support services
- Cost per client placed

**Figure 2**  
**Sample Dashboard Indicators Report (from Towards Employment)**

1. Workshop Enrollments and Completions

	Last Year	Year to Date (YTD)
Number of Referrals	438	388
% Starting Workshop	46%	56%
% Completing Workshop	29%	41%

2. Job Placement: Client Placements vs. Clients Served

	Served	Number Placed	Percentage Placed
Last Year	390	205	52.6%
YTD	223	128	57.4%

3. Job Retention and Average Wage

	Placed	30-Day Retention	90-Day Retention	180-Day Retention	Average Wage
Last Year	205	93.2%	81.0%	65.9%	\$7.77
YTD	128	82.0%	71.1%	67.2%	\$7.76

4. Average Days: From Referral to Services

Last Year	2.1
YTD	1.7

5. Cost per Client Served: Operating Expenses

	Program 1	Program 2	Program 3	Placement
Last Year	\$183	\$578	\$95	2,363
YTD	\$142	\$315	\$115	1,820
Target	\$200	\$300	\$90	2,800

Color Code:

On Track with Goal
Monitor Closely
Needs Immediate Attention

## Make Connections Between Dashboard Indicators and Interim Milestones

Dashboard indicators are crucial for communicating an organization's performance in broad, accessible strokes, but staff may have trouble connecting dashboard indicators to their day-to-day efforts. That's where interim milestones come in. "The most important thing about the database information is that it helps me understand the big picture—the funding scheme and how it's all related to what I do," says George Matos, employment specialist at Chrysalis. Dashboard indicators become "real" when staff can answer the question, "What does this have to do with me?"

Often the answer to that question is found by identifying the key steps that lead to larger outcomes (those monitored on the organization's "dashboard"). These steps are interim milestones, and they help staff stay connected to long-term goals. Take, for example, employment retention. If six-month retention rates are a "dashboard indicator," what milestones can staff seize upon to gauge the effectiveness of their work?

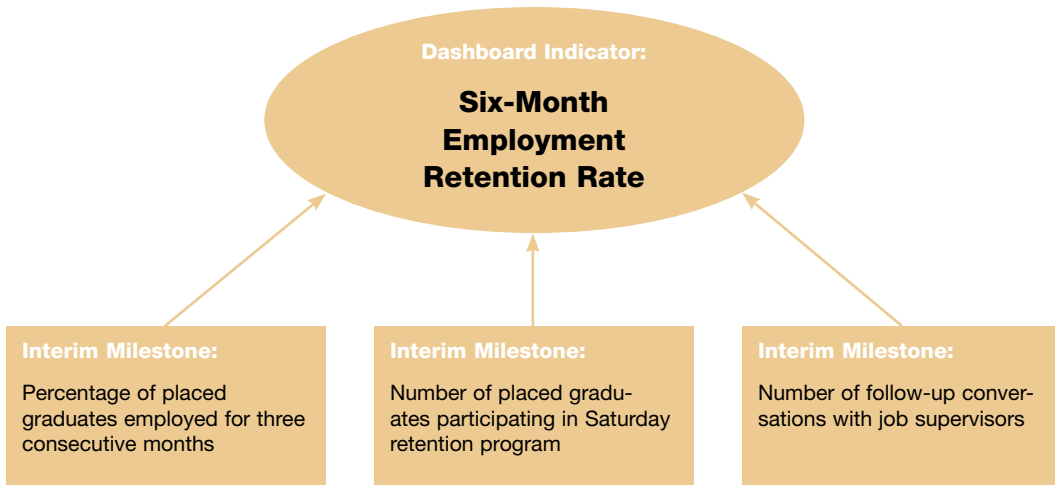
As seen in Figure 3, there are a variety of interim milestones that could be attached to employment retention. The percentage of graduates employed for three consecutive months, the number of graduates attending retention events, the number of staff contacts with graduates' job supervisors—these are all possible predictors of six-month retention outcomes. Other interim milestones might include the number of

placements with health benefits and the number of placements that pay \$10.00 an hour or more. Based on experience, organizations choose which milestones to focus on.

"You get what you measure," say those involved in the performance-improvement business. When Rogena Thurber-Waheed started as a site director at Chrysalis in 2000, she noticed that staff meetings were often spent discussing things like paperwork and relapse programs—peripherals that were relevant to their work but not central to their mission of getting people jobs. She began opening staff meetings by looking at key milestones in clients' paths through the Chrysalis program: "How many clients have moved from initial orientation to assessment? How many completed all four of their job readiness workshops? How has that influenced our placements? And how many jobs do we need to get this month to reach our annual goal?"

Meetings are one good way to focus staff's attention on interim milestones and larger dashboard indicators. But just as a car dashboard isn't helpful if the lights are burned out, key indicators and milestones have to be visible if they are going to motivate improvement. Employment specialists at Chrysalis knew where they stood because performance bar graphs for the department hung like wallpaper above Thurber-Waheed's desk. At a glance, she and all her staff could see graphs of employment outcomes for the past two years, attendance graphs for their various job readiness workshops and monthly placement rates for

Figure 3  
**Sample Interim Milestones for Employment Retention**



various staff members. These charts provided the context for conversations at their monthly staff meetings.

Another way to focus staff's attention on key indicators and milestones is the use of outcomes data and goals as part of individual and program performance evaluations. All of the organizations described in this report use data on specific outcome milestones to inform individual employee evaluations, leading to consequences ranging from merit pay increases to disciplinary action. In some cases, individual pay is also affected by the whole team's success in meeting particular goals.

As Barbara Edwards Delsman from HOPE commented, "Senior staff review outcomes weekly and the entire staff does quarterly. There is no downside to this process. We

know how we are doing as a program, and how we are performing individually. Those who resist the process receive poor evaluations, do not get raises, and in a few cases were terminated." Has more use of data led to more employee terminations? As another executive director described their process, "The data serves as a 'flag' that someone is not pulling their weight or is becoming stagnant on the job. Terminating non-performing staff doesn't happen solely because of having more outcome data, but data makes the issues more transparent."

The HOPE Program moved cautiously toward its use of interim milestones as part of individual staff evaluations. Initially, staff were asked to set milestone goals, but those goals were not to be used for evaluation purposes until baseline data had been collected. "We can't change what the funders

require,” says Edwards Delsman, “but we want to try to agree on individual goals that would help us meet those outcomes. For example, if our indicator is that 85 percent of graduates will get jobs, a job developer’s goal might be that 20 of our internships will turn into jobs. We know this can be scary for staff in terms of accountability. But our goal is to turn it into a positive learning experience.”

Because staff performance evaluations can depend on success with certain interim milestones, it’s important that those milestones be carefully chosen. Lucy Runkel coordinated the BEST program at JVS and sat on the JVS Outcome Measurement Committee. “The committee has been a good way to get a cross-section of staff talking about what interim milestones we really want to measure and how we would do that,” she says. As part of her role on the Outcome Measurement Committee, she was able to talk individually with staff to learn their needs and concerns about using the database. According to Runkel, even in organizations like JVS, which work to make “dashboard indicators” and interim milestones known, buy-in happens “one person at a time.” Choosing milestones has to be a consensus process, says Runkel. “It’s important that there is buy-in among individual staff about what the most important process measures are—especially if they are going to be tied in any way to performance evaluations. Finally, the bottom line is: Do participants get jobs? Staff need to be clear that tracking other things, like skill attainment, can eventually make a difference in that bottom line.”

## **Collect Qualitative Data, Too**

Interim milestones can be measurable outputs, but they may also take the form of qualitative information about participant needs and life changes. Numeric data will never be able to tell the whole story of what’s happening with customers or clients. Staff also need to have qualitative measures that will tell them (and their supervisors) that they are having an impact on performance—for example, anecdotes about increases in clients’ self-esteem or new community supports in place.

Since milestones may include changes in participant behaviors, organizations should collect qualitative information that can document such changes. Knowledge conveyed by dashboard indicators is deepened and clarified by qualitative information from case notes and customer satisfaction surveys, or focus groups involving participants, graduates, employers, staff or community partners. Documentation of this information is critical.

Training, Inc., for example, maintained case notes online, where it also kept the performance evaluations that staff conducted with trainees every six weeks. The narratives provided by the case notes were also coded according to topic—such as attendance or child care. Staff could review the overall themes of the case notes and evaluate trends in trainee issues. Having performance evaluations online allowed all staff to view progress over the length of the program and provided useful information for job placement staff. Finally,

Training, Inc. also collected employer feedback on trainee internships, with both quantitative ratings and general comments on performance. This information was maintained in the database and was a good reference for training staff in discussing possible program adjustments.

# Nurture the “Inquisitive Mind”

*It’s one thing to have staff entering the data about where participants are hired. It’s the next step organizationally to have them ask of the data, “Can I find out which employers have been most successful with our participants?”— which shows that they are beginning to ask their own questions. That takes a longer time to happen.*

—Steven Redfield, STRIVE

Dashboard indicators and interim milestones can give organizations and individual staff good feedback about their progress. But what if performance isn’t moving in the right direction? What if there is a gap between envisioned outcomes and the actual situation? And how do organizations know they’re tracking the right interim milestones? This is where staff must develop theories about what could be influencing performance and then use data to confirm or disprove those theories.

Not every staff member fancies himself or herself to be a detective, looking for clues to solve the mystery of some performance gap. Certain staff will always have more aptitude than others when it comes to

analyzing data. But almost everyone feels comfortable asking questions and sharing ideas based on their own experience. This “inquisitive mind” can be nurtured by organizations seeking to improve performance.

When staff at Training, Inc. noticed increasing participant dropout rates, they brainstormed a number of possible factors that could be in play. One of those factors was the applicant orientation process, which they hypothesized did not help applicants look at whether the program was appropriate for them at that time. Staff designed a new group orientation that provided more information about what participants could expect, and they also obtained more information from applicants about potential challenges. Subsequently, Training, Inc. saw an improvement in program completion rates.

## **Discuss the Data Frequently and Positively**

The agencies highlighted here took time in weekly, monthly or quarterly staff meetings to review reports about their indicators and milestones. They also looked at related

anecdotal information, and, together, their staffs reflected on what the data might mean. The agencies discussed insights the data occasioned, additional questions raised and possible program changes that may have been warranted. Often, they came up with hunches and questions that drove new kinds of data collection.

Creating an environment where this kind of thinking takes place is more complicated than it might seem. Chrysalis' Rogena Thurber-Waheed says that a sure way to shut down productive dialogue is to make the practice of looking at data an experience where leaders say, "You're not good enough" to staff. "It's important that staff experience data as a catalyst for asking questions and sharing ideas on what we could be doing better." For staff to begin to reflect on data themselves, the setting has to be safe: They must feel that they can be honest and not defensive about the story the data is telling. Leaders must ensure that there is a positive, nonjudgmental environment for open dialogue around the information.

George Matos at Chrysalis admits that his learning curve as a job developer was steep. "It's like learning anything—staff were afraid of the unknown... afraid of being embarrassed by their lack of proficiency." But Matos attributes the strides his staff made to Thurber-Waheed's leadership style. "We're not afraid of making mistakes here—from Rogena to the newest staff person. You just admit to having made a mistake and work on how you're going to correct it. It makes for a good learning

environment. Even when we look at how our individual results compare month to month, it's not so much a competition among staff. It's really a competition with ourselves to do it better. Seeing the data on who's doing well helps us know who we can possibly learn from."

At Training, Inc. the first time staff sat down to review data about participants' typing skills, there was tension around the table. The good news was that keyboarding speeds were increasing. The bad news was that they weren't increasing nearly enough to meet job requirements. Says Peggy Frame, who was then deputy director, "It would have been easy to just tell the trainers that those speeds had to be improved. But we were able to push the conversation through to look at what could be affecting the results, particularly the process trainers were using for setting typing goals and doing practice tests. Facing the reality of those typing speeds on one sheet of paper helped us to make some good improvements. We changed the frequency and type of keyboard drills we were using, and we have seen the speeds go up."

As important as it is to use data to identify potential problems or gaps between projected performance and actual results, it is equally important to use data to highlight and celebrate progress. If you're a board member, a staff member or a friend of Training, Inc., it's not unusual to receive an email from the executive director with the latest performance indicators report attached: "Just thought you'd like to see

our progress. Congratulations to everyone for working hard to produce these results!” Instead of keeping the data in a file somewhere, organizations can use new reports as an opportunity for teambuilding.

Data can reinforce staff’s core vision and passion for making a difference. Rogena Thurber-Waheed shared a monthly report with Chrysalis staff showing that 241 people had found jobs for the year to date in their site alone. She captured staff’s imagination by noting that the number represented an average of one placement per day for that year: Because of their efforts, she said, each day, one more homeless person would make a fresh start.

### **Jump to Questions— Not Conclusions—About the Data**

Even when the information about results wasn’t entirely positive, the organizations featured in this report found ways to involve staff in analyzing data and asking questions about potential reasons for gaps in performance.

Training, Inc. expanded its data collection in 2001 as part of a three-year project funded by the Joyce Foundation to improve job retention and advancement outcomes. Overall, data showed that graduate job retention and wage rates improved significantly over the project period. But the staff’s gut feeling was that the gains were not universal among graduates. They decided to test that hunch by looking more closely at retention data.

In analyzing 18 months of data on retention and advancement outcomes, Training, Inc. noted that there were indeed three distinct performance groups, which they named Advancers, Maintainers and Strugglers. Advancers had made significant wage gains, Maintainers were retaining employment but with little wage growth, and Strugglers were not able to retain their positions.

Training, Inc. staff began to ask questions of their data to test various factors that might be influencing job retention. They were surprised to learn, for example, that the frequency of contact by a job coach did not seem related to graduates’ final outcomes. Having a high school diploma or GED, however, did seem to be a key influencing factor—and so did the length of time a graduate had received TANF assistance.

The data provided clues and pointed the direction for additional information gathering through focus groups and interviews of employers and graduates. Additional qualities began to emerge as key to the success of the Advancers and Maintainers—for example, taking initiative and using personal resources. The staff used all of this information to redesign some of their feedback and evaluation processes for participants and to look at additional ways to reinforce the personal qualities that seemed most critical to success.

Towards Employment also had the opportunity to ask questions of their retention-related data. When it first created a pilot program to increase job retention, data

showed that case managers averaged three to six contacts per month with participants on the job. But when the program was later implemented on site with a local employer, data showed that contacts between case managers and new employees were averaging only one per month. This gap led to a series of questions about what factors might have influenced the decrease in contacts. Conversations with the new employees and employer administrators revealed that over time the image of the retention program had shifted away from future-oriented career-advancement assistance toward a more immediate problem-solving or barrier-removing process. The program took several steps to revisit and reinforce its mission, including changing the staff's image of their role from "case manager" to "career advisor."

Similarly, at Chrysalis, staff were compelled to investigate attendance data for their post-employment retention workshops—the numbers weren't as high as they had expected. In discussing possible influencing factors, it became clear that many staff perceived their task as getting people jobs, instead of keeping them employed. It was a helpful "aha" experience, and as a result of those conversations, Chrysalis staff focused more consciously on retention throughout the training process. They added more pre-employment sessions on goal setting and the challenges of being new on a job. These sessions helped participants understand the benefits of attending the post-employment workshops.

## Find Tools that Foster Deeper Analysis

It's easy for staff conversations about influencing factors to be driven more by anecdote than by data. A job developer who is stung when his star applicant fails an employer's drug test may passionately declare the need to invest in drug screening. Hearing a case manager's stories about a few applicants with college experience can lead to unhelpful generalizations later. Learning to ask more questions (about frequency, scope, etc.)—instead of quickly jumping to conclusions—is not automatic. But certain tools can encourage this kind of discipline. Using a simple list of questions can be enormously helpful. These include:

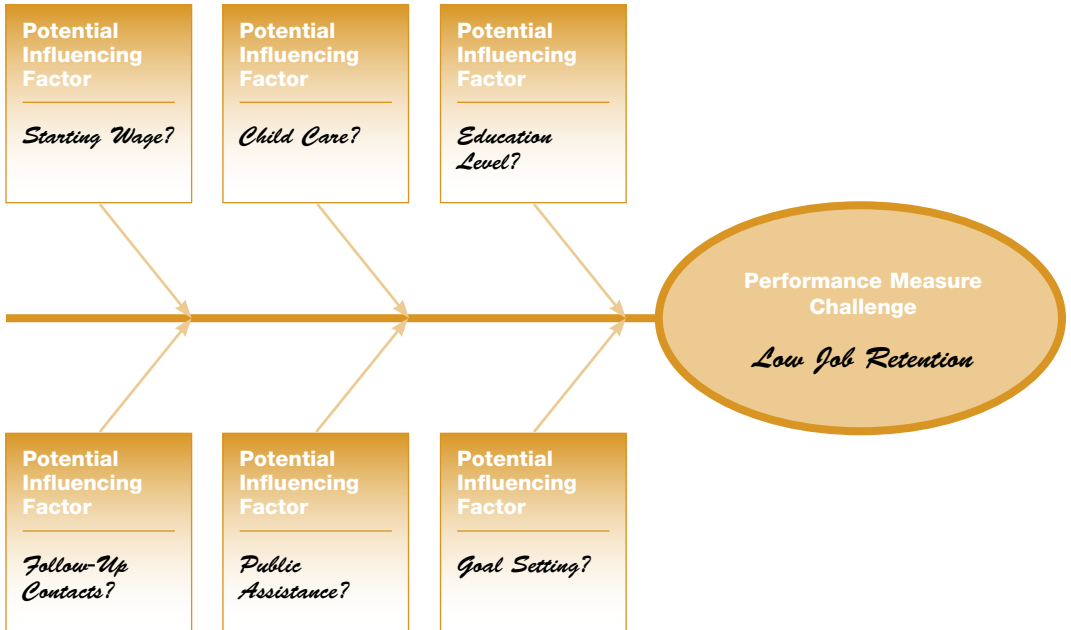
Questions of context, such as:

- How do these data compare with last year's results?
- How does site A compare with site B on that measure?

Questions of specificity, such as:

- Of those placed, how many were placed in jobs with benefits?
- For those who dropped out, which week did they stop coming?
- How did those with a GED perform, compared with those without?

Figure 4  
**A Fishbone Diagram for Low Job Retention**



Source: Adapted from Brassard, Michael and Diane Ritter. 1994. *The Memory Jogger II – A Pocket Guide of Tools for Continuous Improvement and Effective Planning*.

Questions of inquiry, such as:

- Is there a connection between our job retention rate and participant age?
- What are the possible reasons those test scores are lower?

Questions of validity, such as:

- How can we be sure that data are right?
- What else could we measure to be more certain?

Other simple tools have also proven to be effective. Training, Inc. and Chrysalis have both used the “cause and effect” diagram—informally known as the “fishbone.” This diagram provides a basic structure for brainstorming factors that might be influencing performance or are at least correlated with it. It can be used to focus group conversations in a staff meeting, and many say it helps staff see the relationship between what they do and eventual program outcomes.

In the example in Figure 4, staff focused on a performance gap in the area of employment retention. They jotted down “low job retention” (their focus) in the orange oval on the right; then they brainstormed a list of factors that could be in play. Such correlating factors could include participant characteristics, such as education level or receipt of public assistance. Other factors might be more service-related, such as follow-up contacts, goal-setting activities or starting wages. Environmental factors like the availability of child care could also be involved. These potential influencing factors were all written in the smaller boxes along the spine of the fishbone. The diagram helped staff think about and record their ideas for what could be causing low retention rates. The next step would be collecting and analyzing data that help test the various theories.

Correlation does not equal causality, but encouraging staff to notice correlation—and mapping out potential influencing factors for all to see—is a good step toward using data more effectively. Management can work to foster an open, nonjudgmental environment for group discussions. And tools like the fishbone can help staff ask questions and develop hunches, which can then be tested.

# Help Staff Experience the Benefits of Using Data

Part of the challenge in creating an outcomes-driven culture is addressing frontline staff's concerns about time spent on data collection—particularly because this is time being taken away from directly serving participant needs. Data collection is one more thing on a very crowded plate. Therefore, it is essential that staff have experiences with data that actually make it easier for them to effectively serve participants.

## “What’s in It for Me and My Participants?”

Staff at the six organizations profiled for this report have come up with a variety of answers to this question.

George Matos was used to the mounds of paperwork he needed to deal with as an employment specialist at Chrysalis. But he was much more comfortable counseling homeless clients than he was working with an Excel spreadsheet created to track bus-token use by job seekers. Over time, however, Matos learned that the spreadsheet made his monthly reports on the use of supportive services funds much easier to

complete. From there it was a quick step to using the Chrysalis participant database, where he can learn details about a participant's background. “It sure beats my prior method of finding the file and then trying to decipher a colleague's handwriting,” he says. “I'm more organized and more focused than I was doing things manually.”

The HOPE Program staff initially feared that a new system—despite its obvious benefits—would steal too much of their limited time. But as part of their system-implementation process, HOPE managers consolidated data collected on several different paper forms and eliminated data that were not being used. Frontline staff became more supportive of the new system as they saw management's effort to lessen paperwork and make better use of staff time. The database (not paper files) became the repository of information needed by staff to do their jobs. “We used to use email to share news about participants—jobs, accomplishments, etc.,” says director Barbara Edwards Delsman. “Now we just tell staff that there is great news about so and so and that they'll have to check the database for details!”

Liz McGuire was the life skills educator at HOPE. As one of three trainers in the program, she was responsible for collecting initial applicant information during an interview. Like other HOPE staff, she prided herself on the program's strong personalized approach to working with participants who often feel "depersonalized" by the public systems they depend on for assistance. When Edwards Delsman suggested that it would save time to enter applicant information directly into the computer during an interview, McGuire was skeptical. She feared doing so would create the very bureaucratic, red-tape atmosphere they were trying to avoid.

Still, McGuire gave it a try. "First, though, I rearranged my whole office so that I could face the computer together with the applicant. We reviewed the program application together, and I entered it so that she could see exactly what was there and confirm that it was right. We'd stop from time to time to discuss things I was entering and dig a little deeper into the details. I was surprised at how well it worked. It not only saved time but gave us something to focus on together. I was able to keep that personal touch that is so important. I realized that the technology is not the issue—it's all in the approach of how you use it." McGuire also found an unexpected benefit when one of her participants experienced a serious asthma attack: She was able to print out critical information on the participant's medications for the emergency medical technicians when they arrived.

After the initial hurdles of implementing a new data system, staff at these six organizations experienced benefits that outweighed the time and hassle involved in learning new patterns. Staff found they could be more efficient—they could get real-time data about participants by accessing intake files or updated case notes. Says Tuwhanna Lewis, who supervised case managers at Towards Employment, "It makes a tremendous difference that a case manager can access notes about someone else's client—we avoid duplication of services." Colette Grant, a career path counselor and placement specialist for STRIVE/Chicago, observes that "someone can have great attendance or skills and still have an attitude problem—and I really need to know those things! The database gives me a place to note that kind of anecdotal information so that I or someone else has the full picture."

### **Develop Reports that Are Useful to Staff at All Levels**

Better access to information is not the same as increased knowledge. If a comprehensive database is a treasure chest of information, good reports are the keys to unlock that treasure. Knowledge gleaned from reports can confirm intuitive hunches, trigger changes, reinforce effective practices and ensure that customer needs are being met.

"Our reports are most useful to me because I can see what's new or unusual in our client demographics," says Lewis. "They help me anticipate a changing need that may require different resources."

Cindy Gosser, a job developer at Training, Inc., was an enthusiastic advocate of her organization's database: "It has really helped me keep track of how our relationships are going with various employers, since I have reports that tell me how many graduates they have hired, how many are still working, when they last hired someone or hosted an internship, and what kind of feedback they have provided. That helps me plan my phone calls or visits in a much more thoughtful way."

People with different roles in an organization need different kinds of data to make their jobs more productive. Senior administrators may only need to see the dashboard indicators to know what their priorities should be. A program manager may want to see results grouped by job developer or trainer to know where additional coaching is warranted. Frontline trainers will probably need much more detail about participant skills, interests, issues, attendance, etc., to be able to do their jobs well. And resource-development staff may want data on different cohorts of job seekers (such as those who have experienced domestic violence or substance abuse) so they can better target their requests to funders.

For frontline staff and managers, the most useful reports may be as simple as sorting data by different subgroups, providing new perspectives that can shed light on possible influencing factors.

For example, reports or data queries like the following can help staff test a gut feel, answer a useful question or complete a task more quickly:

- *Services a participant has received from other programs in the organization;*
- *Retention follow-up information sorted by next scheduled contact date;*
- *Attendance information sorted by class or by counselor;*
- *Placement results sorted by job developer;*
- *Placements sorted by industry;*
- *Retention data sorted by employer;*
- *Enrollees sorted by their referral source;*
- *Child-care providers sorted by zip code;*
- *TANF referrals sorted by the case manager or office that sent them;*
- *Program dropouts sorted by which week they left the program;*
- *Employment terminations sorted by the reasons they were terminated; and*
- *Supportive-services information sorted by type of service.*

The agencies profiled here all emphasize the importance of first getting broad input from staff about which reports the system needs to produce—and why. If staff could have any report they wanted, which would be the priority to help them do their jobs more effectively? What kind of a report should the organization regularly look at together to know if it's on track? Even though the process will never produce all

Figure 5  
**Different Questions, Different Reports**

**All Staff and Board:** Are we achieving our organizational goals? Are we realizing our mission? Are we improving?

**Dashboard  
 Indicators  
 Report**

**All Staff:** Are we “on track” to achieve our goal? Are we accomplishing the critical interim steps?

**Interim  
 Milestones  
 Report**

**All Staff:** Do our outcomes vary by different groups or different services received? What hunches about influencing factors do we want to test?

**Reports on Outcomes  
 Sorted by Cohort**

**Frontline Staff:** What do I need to know to provide the best service to my individual customers?

**Individual Client  
 Service Reports**

the reports that staff wish they had, asking for and honoring staff input as much as possible greatly pays off.

HOPE gave its staff two months to work with a consultant to identify the most useful reports. Extensive staff input to the consultant—with time to really “prime the pump” and jot down ideas as they went through their daily and weekly routines—helped foster buy-in for the system that was eventually developed. The consultant created several test modules that were used by different staff and relied on their feedback to tweak the features so they were as user-friendly as possible.

Involving staff in report development is crucial to making reports useful, but it isn't the only necessary step. Staff also need to learn

how to use a new database—how to input data, how to generate reports and, when things go wrong, how to troubleshoot.

### **Provide Training (Both Formal and Informal)**

“They won't use it if they don't feel comfortable with it—plain and simple,” says Joyce Duvall of Training, Inc. It was, in fact, a lack of resources for ongoing training and technical assistance that led her organization to convert its Lotus Notes database to an Access system that seemed more user-friendly.

The other organizations profiled all say that training in the use of a tracking system must be ongoing—whether the training is formal or informal, verbal or written.

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### **Good Documentation for Database Users**

To be most useful, database documentation needs to:

- Be organized around very practical “How do I...?” topics;
- Be created by those who actually use the system;
- Include plenty of “screen shots” to help those who learn visually; and
- Be updated on a regular basis.

Too often, staff receive a few days of formal training when a new system is installed, and then it’s “use it or lose it,” unless there is some structure for continuing the process. That structure can include informal peer coaching and good documentation, along with clear expectations about learning and using the system.

At JVS, all staff received training on the Access database as part of the agency’s orientation for new employees. The full-time data manager trained supervisors when changes were made to the system, and the supervisors passed the information on to their departments. The data manager also did a quarterly brush-up training session for interested staff and was on call for individualized help when needed.

Towards Employment’s Walter Ginn says support for a database can be bolstered by finding a frontline staff member who is enthusiastic about using the system and seeing what else it can do. This staff “advocate” can stand with one foot in the programmatic trenches and the other in the realm of data management, soliciting feedback from other line staff and informally mentoring them in making better use of the system.

Many staff will need a mentor. Counselor Colette Grant of STRIVE/Chicago confesses that her knowledge of the computer was limited to the location of the on-and-off button when she began her position. Her director told her that doing forms manually

was just not an option. She was motivated to learn STRIVE's database by sheer peer pressure: "I was the only one around not using the computer—I needed to get moving with the times!" Other staff in the office helped her learn the system; they even celebrated her eventual achievements by presenting her with a Case Note Leadership Award for using the database to give a detailed picture of participants' issues.

A hallmark of organizations that use data successfully is that they have good documentation about their database systems to support formal and informal training. They provide written definitions of fields that may be ambiguous, such as enrollment date or termination date. They have written procedures with plenty of simple visual aids for entering data, retrieving it and creating basic reports. This documentation increases the consistency of data collection and can boost the confidence of new users. Many programs insist that this kind of documentation be part of the package they buy from an outside source. Others create their own on an as-needed basis, eventually compiling a full user manual.

# Build Systems to Enhance Data Quality

It's a director's nightmare: The report is due to the board at 4:00, and the latest database printout says that the average placement wage for the year is \$56 per hour. Somewhere someone has skewed the average by entering annual wages instead of hourly rates, but who has time to find it? Problems with data entry can sabotage even the most well-intentioned efforts.

The fact is, a terrific system design means little if staff don't set aside regular time to enter and check their data. To be useful, data has to be credible. Inaccurate data can lead to bad decisions. And if people get the impression that data is deficient, they can lose confidence in the entire system and stop using it.

Agency directors interviewed for this report say that it can take almost 18 months to really trust that the data in a new system and the reports it generates are accurate and complete. Of course, the collection of good data does not happen by accident. The organizations we talked to have found that the clearer they can be in answering the question, "How will this help me get better results in my job?" the more staff will use a new system and work to provide good data.

There are other strategies that can help as well. The database software can be a strong ally. Important fields can be programmed to only accept data in a certain format—wage as an hourly figure instead of an annual figure, for example. A data screen can refuse to let someone exit until a missing piece of information is entered. Fields or screens can have security features that limit who can enter information or make changes.

In addition to these technological checks, there are broader organizational policies and procedures that can help improve data quality.

## **Tie Data Quality to Job Performance**

A powerful strategy for enhancing data quality is tying individual performance evaluations to outcome results and data quality. "If it's not in the database, it didn't happen" is the mantra of Rogena Thurber-Waheed at Chrysalis as she posts bar graphs of employment results on her wall. Staff evaluations include ratings on how well they enter data that is accurate, complete

and timely. Walter Ginn says that Towards Employment's data quality improved immensely once it was added as a component of staff's performance evaluation. "Including data submission in our evaluations raised accountability very quickly in our existing culture. The 'old line' staff either complained but complied—or they left." It should be noted that this was not done until leadership knew that enough training had been provided to make high-quality data entry a reasonable expectation.

Even where such formal accountability for data quality may not exist, informal accountability can provide an incentive for staff to enter data accurately and completely. Steven Redfield of STRIVE/Chicago says that taking the time to regularly print out data for staff to review is a simple way to drive home the need for complete and accurate data. A report summarizing case notes from various counselors can produce a variety of reactions, from "Wow—someone's actually looking at these" to "Yeah, I really have talked to a lot of people this month" to "Hey—as a job developer, I can't do my job if your case notes aren't up to date." In such a setting, staff can see the larger picture of how their data play a role in other team members' effectiveness.

### **Check It Twice: Have Clear Quality-Control Assignments**

Poor data quality is less likely to be a matter of how a database is designed and more likely to be related to the people

responsible for data entry and data quality. Organizations take a variety of approaches to the process of data entry. Some assign major data-entry and quality-control responsibilities to only one or two people. This can work well when the data entry is based on paper forms that have been manually completed, such as an application for training, and when familiarity with program services is not critical. But most agencies agree that data entry for skill development, anecdotal case notes and job follow-up information should be done by the staff who actually work in those areas.

Checking that data are entered correctly should be a regular, ongoing process. Chrysalis employment staff checked data by printing out a report at the end of each day. They reviewed their data again at the end of each week and yet again at the end of each month, always looking for places where data might be missing or inaccurate. "We're good about doing our documentation as we go," says George Matos.

At Towards Employment, managers reviewed all databases once a month and also audited case notes on a random basis. Training, Inc. staff members were each assigned an area of data that was related to their function, which they were responsible for monitoring. One staff member also conducted random audits on a regular basis.

While the specific systems vary, the organizations profiled here agree: Monitoring data quality is a crucial element in becoming outcomes-driven.

# Invest Continuously in the Technology

In an environment of constant change—in the capacity of the technology, as well as the practice of workforce development—it is clear that investing in a data system cannot be a one-time proposition. Agency directors are quick to point out that the actual purchase of software may only be a small piece of what’s needed to put a tracking system in place—investments in equipment, staff training, consultant time, maintenance and upgrades are also necessary. “We were shocked to figure out how much this was really going to cost us,” says Rogena Thurber-Waheed. She estimated that it could easily cost Chrysalis \$150,000 if all related factors were taken into account. Other agencies’ cost estimates ranged from \$20,000 to \$250,000, depending on the size of the organization and the complexity of the system it needed. Most agencies find that simply maintaining their systems costs between \$20,000 and \$40,000 annually, including staff time and training.

Thurber-Waheed cautions: “Your data system is not a quick-fix solution. It’s really the last step—you first have to know what your core data needs are, based on your

organization’s mission and goals. Then you need to look at how your organization operates, or how you would like it to operate. Let those things drive your software decision. Bells and whistles may be nice, but sometimes the system can do lots of things except the things that you need the most! You can put a whole lot of money into a system, when Access and Excel may do just fine.”

Because of the complexities of their service offerings and funding streams, many organizations choose to create their own software applications rather than purchase “off the shelf” software that requires expensive customization. In fact, a common challenge is that organizations are often using several parallel systems—an Access system tracking one function, an Excel spreadsheet capturing data for some other function, an external database required by a funder, etc. Ideally, an outcomes-driven organization will make a priority of integrating and managing all of its data—because having data in one place makes flexible, comprehensive reporting possible.

## It's More than Bells and Whistles

Ask program directors which criteria they'd use if, knowing what they know now, they had to choose a new system—and flexible reporting and user-friendliness are always at the top of the list. Externally, funders and sponsors are asking for more and more outcome information, in a variety of different reporting formats. And internally, as staff become more comfortable with using data, they start asking more and more questions, which can only be answered with new kinds of reports. Thus, it is critical that software be able to generate new reports and queries easily and quickly.

At Training, Inc., staff felt fortunate to receive major donations of computer network equipment, Lotus Notes software and consultant time as part of a national Training, Inc. grant. But after several years, staff concluded that the system wasn't flexible and user-friendly enough for them to feel comfortable manipulating the data. It also became increasingly difficult to find reasonably priced technical support, so Training, Inc. made the decision to convert its existing database to Access.

Even with extensive staff input to consultants, it's impossible to know how things will work until the system is up and running. Some agencies first create a dummy or pilot system with a reduced number of records. They arrange for a few staff to use the system, testing its friendliness and reporting features. This allows much more

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## The REAL Costs of Putting a Data System in Place

Organizations need to consider all of the following costs:

- Staff time spent designing the system;
- Initial software costs or licenses;
- Upgrade and enhancement costs paid to consultants;
- Servers, new workstations and additional computer memory;
- Hiring additional staff or consultants to maintain the system;
- Staff time to coordinate with MIS systems of funders and other partners;
- Networking costs (phone line and Internet) for sharing data;
- Training and technical support for staff; and
- Additional staff time on data entry and "cleaning" old data.

fine-tuning to happen before the final system is rolled out for the full staff.

Given some funders' interest in building organizations' capacities to track and use outcomes information, many agencies have been able to find funds to implement a new system or upgrade an existing one. But it is important to be clear on the "hidden costs" of making the system work—technical support, equipment maintenance and upgrades, data-entry time, staff training—and to build these costs into ongoing operating budgets.

It helps to constantly seek ways to reduce costs through new technology. Software vendors now offer customers more choices than ever before. Flexible pricing options are available through Application Service Providers (ASPs), companies that develop and host software applications on their own servers. Organizations pay a monthly rental fee to enter and store data on the ASP's server, using any standard Internet browser. Sometimes pricing is based on the number of records the organization has in the database; other pricing structures involve a one-time licensing fee and subsequent monthly fees per user.

There can be several advantages to using an ASP, especially for smaller organizations. ASPs allow organizations to avoid the costs of developing and updating their own software. Costs are spread among many clients, keeping individual investments at a reasonable level. When ASPs upgrade software with more features for one client, those features

often become part of the standard package offered to all customers. ASPs also provide regular system backup services, staff training and technical support. This can be helpful to smaller organizations, which may have trouble attracting and keeping employees with more sophisticated information technology skills.

STRIVE National selected an ASP software called CaseManager in 2002, and many STRIVE affiliates have also adopted the program. Steven Redfield says that sites received a lot of services for a reasonable cost. Interacting with the system through the Internet has been convenient, and concerns about confidentiality of client information were resolved by using security features for individual fields.

Successful use of the ASP model is only possible, however, if a software application can be designed to meet the data collection and reporting needs of workforce development practitioners, with minimal customization after the initial launch. Some ASPs provide customization services for an additional consulting fee, and these extra charges can quickly add up. Organizations using ASPs must have fast, reliable Internet connections, and practitioners need to be comfortable with the ASP's privacy and security measures. Finally, organizations must be confident about the stability and longevity of the companies with which they choose to work.

## Balance Using Consultant Expertise with Building Internal Staff Capacity

For each of the organizations we studied, having a consultant it could trust was critical to using data more effectively. Says one program director, “The best consultant is in it for the long haul and can help us think strategically about the best approach, given our limited resources.”

Each agency used consultants to help with at least part of its implementation process. At rates of \$75 to \$150 an hour, consultant fees can accumulate quickly and can easily deplete scarce resources. Agencies shared horror stories about consultants who, in the end, were not able to produce the application according to the criteria specified. In one case, when they needed to make changes in a consultant-developed application, staff discovered that it would be very costly because the developer, not the organization, actually owned the programming code.

The HOPE Program paid its database consultant on a “deliverable” basis rather than on an hourly one. Their deliverables represented various stages of the development process. “This helped us keep our consultant focused on the goals,” says Barbara Edwards Delsman.

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## Choosing a System—Key Criteria

Practitioners emphasize the following criteria for choosing a data-tracking system:

- Easy report generation;
- Simplicity and user-friendliness;
- Flexibility for customization;
- Reasonable cost;
- Ability to interface with other systems;
- Readily available technical support and training; and
- Compatibility of pre-programmed data fields with identified data needs.

## Choosing Database Software—Weighing the Options

Option	Benefits	Challenges
<p><b>1. Publicly available software, e.g., Microsoft Access</b></p>	<p>Consulting support and staff training are more accessible</p>	<p>Meeting design and reporting needs still requires some technical expertise</p>
<p><b>2. Consultant-created proprietary software</b></p>	<p>Can be tailored specifically to an organization's data and reporting needs</p>	<p>Continuous tweaking can become too complex, with the cost of programming greater than the value added</p>
<p><b>3. Off-the-shelf proprietary software</b></p>	<p>Saves programming time, since the software template may already include needed fields, reports and features</p>	<p>If created for another target market, may include many unnecessary fields</p> <p>Cost of initial customization can be high</p> <p>Additional report creation can be costly and time-consuming</p>
<p><b>4. ASP proprietary software</b></p>	<p>Can be priced per user, so it can be less costly</p> <p>Can get regular updates reflecting enhancements for other users</p>	<p>Reporting capacity and vendor responsiveness vary</p>

An alternative to using consultants, of course, is to set aside internal staff to work on the application. Frontline and middle-management staff find it empowering to understand and be able to use simple reporting and querying features or to be able to make basic changes in forms to accommodate program or funding changes. Having to wait weeks for a consultant to do these tasks is discouraging, and having the training to do it oneself encourages more creative use of the data. But managers need to pay attention to the possibility that demands on staff time are not worth the benefits they produce.

Training, Inc. relied on internal staff who had received basic training in developing a Lotus Notes application. Because financial resources were limited, the organization hoped to save money on development and simultaneously enhance long-term internal capacity to manage the database. It did negotiate a discount rate with consultants for help with the more technical aspects but found that it was often difficult to get the consultants' attention.

Over time, Training, Inc. recognized a number of challenges associated with its approach. Using internal staff meant a very long and drawn-out development process. Typically, staff did not have the technical expertise to make the system as user-friendly and flexible as it needed to be. And, finally, there was the danger of staff turnover in the middle of the development process. Other organizations echo this concern. According to one program director:

“Once our MIS staff are finally trained, they and their system knowledge move on to higher-paying positions.”

It's clear that actively engaging staff is essential to good system development. Whether they are using an ASP, relying on consultants to build a customized database or working primarily with internal staff resources, organizations will be successful only if their staff are involved with designing, testing and implementing the system from the beginning. Thus, investing in the technology is much more than a one-time financial commitment. Rather, it is an ongoing process of needs analysis, system development and training. As with the other strategies outlined in this report, staff involvement is critical.

# Conclusion: Working Smarter, Not Just Harder

The need for reliable data on workforce development efforts is growing. Funders insist on long-term performance data—not good stories of stellar achievement—to justify their investments. And with fewer resources available overall, it is urgent that organizations have information on short-term milestones to determine if existing strategies are working. If organizations are not consistently investing resources—both staff time and technology dollars—toward more effective use of data to improve their services, they may not be able to compete.

The organizations profiled in this report had been putting their systems in place for years, working in incremental steps. For some, starting small and keeping things simple were the keys to long-term success. Each organization worked hard to embrace the culture of continuous improvement, and the result has been slow but steady progress. Frontline staff and management moved together through various phases: just beginning to collect data on a particular question; finally having reports that are useful; trying out new program

improvements; and planning their next data analysis with more staff, new questions or better software.

“We and our funders have to stop thinking about these databases and computer systems as fixed assets,” says one director. “Maintaining and upgrading them needs to be seen as simply another part of doing business—an ongoing investment for which we need ongoing partnerships.”

There is still a paucity of affordable database software for workforce development organizations. It would, of course, be ideal if there were off-the-shelf software designed with the needs of workforce organizations in mind—software requiring minimal customization and accessible to practitioners who do not have the financial resources or expertise to develop and maintain their own systems. New ASP software hosted by third-party providers may be a major step in that direction. Such applications can serve many organizations and utilize economies of scale to reduce development and maintenance costs. But even these new applications can require significant customization.

If an application could be developed with the upfront input of a broad cross-section of workforce development providers, it might require less customization and would be of tremendous benefit to the field. It will take the support of foundations and social-venture entrepreneurs to make this a reality, however.

Stronger partnerships between funders and service providers to focus joint efforts on collecting and using data could address some of the significant challenges created by the myriad reporting requirements at local, state and national levels. In other fields, a key to the continuous improvement process has been the ability to identify “benchmarks”—standards of excellence or competence that are accepted across the field. In workforce development, it is important that we strive for more consistent definitions of key outcomes across programs and funding sources, and that we begin to identify common performance benchmarks that can motivate programs and staff to focus their improvement efforts.

But beyond investing more resources in developing data systems or identifying benchmarks for the field, it is the commitment of individual organizations to become models of excellent performance that will make the most difference to their survival and to the success of the field. We must continue to learn from other sectors in which organizations build cultures that are outcomes-driven and focused on continuous improvement.

The best computer system available will not help improve program performance if staff do not have input into its design, do not feel comfortable using it or do not see it as a valuable tool for improving service delivery. Training in using data systems and frequent opportunities to see reports need to be built into staff schedules. It is even more important that time be set aside to help staff reflect on what the data are telling them, related ideas for program improvement, and new report formats that could help them do a better job.

Finally, a commitment to using data to improve performance must be a significant priority for organizational leadership—at both the executive and the departmental levels. It takes leadership to facilitate an internal vision about important outcomes—to move beyond what funders require and to foster genuine interest in the story that data are telling. It takes leadership, in the midst of day-to-day survival concerns, to commit to a long-term change in organizational culture—to see that using data effectively can take years, not months. It takes leadership to put processes in place for getting accurate data and to be open to realities the data reveal—especially when those realities point to hard decisions. It takes leadership to create a positive environment that enables staff to experience data as a tool for discovery rather than judgment. Without visible, enthusiastic involvement from top leadership and designated point people at various staff levels, none of this happens.

Workforce development practitioners may not be able to work any harder than they already do. But committing funds, time and leadership to using outcomes data will help them work *smarter*—which could be the key to better performance and higher quality service for our job seeker and business customers.

## Endnotes

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## Appendix A: Contact Information for Profiled Organizations

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(Ms. Frame replaced Joyce Duvall as  
executive director in March 2005.)

## Appendix B: How the Six Programs Invested in Becoming Outcomes-Driven

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### Chrysalis

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Chrysalis serves more than 2,000 economically disadvantaged and homeless individuals each year. The program offers training and employment services in the three locations in greater Los Angeles where poverty is most pervasive: Downtown (Skid Row), Santa Monica and Pacoima. In 2004, more than 1,700 individuals found employment through Chrysalis's services, which include job-readiness classes and support groups, help from employment specialists (with job search and accessing necessary services), and a range of other resources, including resume-building, interview practice, computers, fax and copier machines, mail/voicemail/email service, transportation assistance and clothing for interviews. Chrysalis's internal business division, Chrysalis Enterprises, offers a full-service staffing agency that contracts with local businesses for temporary and permanent positions, and a professional street-maintenance service that provides apprenticeships for Chrysalis' hardest-to-employ homeless participants, designed to impart the tools they will need to go on to independent employment. The organization has 53 staff and an annual budget of \$7 million.

In 2000 Chrysalis purchased a proprietary system, ClienTrack, because its Santa Monica site needed to use it for its local funding contracts. Staff liked the simplicity of its user screens and decided to invest funds to customize it for use by the other Chrysalis programs. Since the system uses Crystal Reports software for its reporting, internal staff also received training in that software.

Estimated cost of initial system setup: \$50,000 in software and consulting costs, including customization.

Estimated annual cost to maintain the system: \$2,000 per year for updates by internal and consultant staff.

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### The HOPE Program

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The HOPE Program is located in downtown Brooklyn and serves approximately 600 people per year with a four-phase program that includes job readiness training, work internships, job placement and ongoing job retention and career advancement supports. The program has 17 full-time staff and three part-time staff, with an annual budget of \$1.7 million.

HOPE has always had a culture of research and program evaluation. For many years its data collection was conducted by HOPE staff, and all analyses were done by an external research organization. In 2001, HOPE decided that the staff would benefit from bringing the entire process in house, thereby providing immediate access to all of the data. After reviewing existing software programs and determining they did not meet HOPE's very specific needs, HOPE staff decided to create a customized program. HOPE owned Access software and, after meeting with consultants, concluded that the software had the capacity and flexibility to handle the program's data collection and analysis requirements. HOPE then found a consultant who was able to do the necessary programming at a discounted rate. Several of HOPE's staff had experience using Access and were confident that if changes to the database program needed to be made down the road, they could easily be implemented.

Estimated cost of initial system setup: \$3,000 consultant fee, plus \$2,500 in data-entry costs.

Estimated annual cost to maintain the system: \$7,500 in consulting and data-entry costs.

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## Jewish Vocational Service— San Francisco

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Jewish Vocational Service—San Francisco is a leading provider of employment services for welfare recipients, low-income workers, youth and adults with disabilities, and immigrants and refugees in the Bay Area. Each year, JVS places 750 to 1,000 job seekers into jobs, and it maintains one of the region's largest job listing clearinghouses, with information on 10,000 Bay Area employers.

In addition to its job placement efforts, JVS provides occupational-skills training in targeted industries—health care, business services, retail and hospitality, and the nonprofit sector—and also has a Vocational English as a Second Language program. Its operating budget is approximately \$5 million, and it has a staff of 65 full-time and part-time employees. With so many programs, JVS has a complex system of public and private funding streams, including government contracts and foundation grants.

Keeping track of all the JVS programs, services and relationships presents a major challenge. JVS has created four internal databases, which are all linked using Microsoft Access. One is focused on participant data, another on employer relationships and outcomes, a third on volunteer engagement and a fourth on “encounters”—which includes type of activity or counseling provided, the length of time involved and relevant case notes.

Estimated cost of initial system setup: \$10,000 in consultant time, plus \$50,000 in staff time and hardware costs.

Estimated annual cost to maintain the system: \$4,000 in consultants and \$6,000 in internal staff time.

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## STRIVE/Chicago

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STRIVE/Chicago, a program of Harborquest (formerly Suburban Job-Link), serves approximately 100 new participants per year in its core four-week job readiness program. Participants are chronically unemployed adults, including many TANF recipients, persons with criminal histories and individuals with low education levels. The program was established in Chicago in 1990. In addition to providing job readiness training, their 20 staff also handle job development, placement through an alternative staffing service, and follow-up for two years after participants complete the program.

In 1998, a consultant helped STRIVE develop a customized database using Microsoft Access. But their need to communicate data across several locations eventually made that system less attractive. In 2002 they moved to a web-based system, CaseManager, a database that has now been customized for STRIVE nationally.

Estimated cost of initial system setup (Access program): \$10,000 for customized program.

Estimated setup cost of national web-based program: \$25,000 for national customization, plus \$6,000 to \$10,000 per site.

Estimated annual cost to maintain the system: \$7,200 a year (\$50/month/user), plus part-time consultant help with data analysis at some sites.

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## Towards Employment

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Towards Employment in Cleveland has helped more than 90,000 local residents succeed in quality jobs. Created in 1976, the organization provides a two-week job readiness workshop, direct placement services for participants, comprehensive supportive services and retention assistance at employer sites for six months. Its nationally recognized Achieve program offers case management and customized training for new employees and their supervisors at selected employer sites. These services are provided under fee-for-service contracts between Towards Employment and employers.

With a budget of \$3 million, a staff of 41 and approximately 4,000 persons served per year, it was important for Towards Employment to find a data management tool that could make access to information easier for staff. They decided to create their own system, with the help of an external developer and a local foundation. The system platform—called Commence—was installed on all workstations and a local server. Changes that staff made to client data were then synched with the server and other workstations on a regular basis. The database was also installed on laptops that case managers use when they are out in the field.

Estimated cost of initial system setup: \$35,000, plus hardware costs of \$10,000.

Estimated annual cost to maintain the system: \$5,000 in external programming, \$20,000 in internal maintenance, and approximately \$4,200 in user license upgrades.

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## Training, Inc.—Indianapolis

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Training, Inc.—Indianapolis, serves a variety of participants, including TANF recipients, people receiving veterans' or vocational-rehabilitation benefits, and other low-income adults. Its Career Track program has specialties in software applications, logistics and medical office skills. The training also includes an internship, job search assistance, case management and at least one year of job retention assistance. The organization trains approximately 175 persons per year. Staff utilize well-developed employer and community partnerships to provide extensive placement and job retention assistance, as well as individualized counseling and referrals for personal issues. Founded in 1981, the program currently has eight full-time staff and a budget of \$798,000, which is funded through United Way, foundation and government sources.

The Indianapolis program was part of a national Training, Inc. grant from IBM in 1997 to upgrade and network computers and to develop a national participant database using Lotus Notes software. Initial technical assistance and consultant time was funded through national grants. But as technical support and funding became less available, Training, Inc.—Indianapolis decided to convert its database to Access, so that it would be in a format that was easier for local staff to use and to get supported. Training, Inc. has been able to get local assistance from consultants from the national NPower project to make the conversion.

Estimated cost of Access system setup: \$3,500 in consultant time and 300 hours of staff time.

Estimated annual cost now to maintain the system: \$5,500 in internal maintenance and \$1,000 in external consulting.



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