Organizational Assessment: 
The Essentials of 
Data Collection, Analysis & Use to 
Promote Positive Change 

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EFSLMP National Subject Matter Experts 

EFSLMP PROVIDER TRANSFORMATION WEBINAR SERIES 
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Data - It Isn’t Just Numbers
Poll Question #1
Which category best describes you?

Direct Support Professional - Employment
Direct Support Professional – Other
Job Development Professional
Middle Management – Employment
Middle Management – Other
Senior Management – Services
Senior Management – Administrative
Executive Director/President/CEO
Other:
Objectives

- The Why of assessment
- The general evaluation cycle
- What to measure: The macro and micro
- Collecting information
- Supporting your workforce to collect data
- Analyzing and using the data
- Sharing the stories and celebrating
Poll Question #2: What Data are you already collecting?

Check all that apply:

- Employment data (e.g., hours, wages, benefits, level of support)
- Achievement of individual goals and outcomes (e.g., take public transportation, learn to use email)
- Satisfaction about services and supports
- Staff time spent on specific activities
- Amount of time people spend in isolating situations
- Other?
Why is Data Collection/Evaluation Important?

I didn’t have anything useful to say so I made this pie chart.

Oooh!

It must be true because it’s pie.

Oooh!

That worked too well.

I pledge my life and my fortune to the pie!
The Organizational Assessment Process

- Data collection, analysis, and use is a CYCLIC process:
  - What information do you need and want?
  - What is the best process and format for collecting desired information?
  - Who is/are the best people to gather desired data?
  - How often should data be collected?
  - Once gathered, who is receiving, analyzing, and making decisions (individuals and/or programmatic) based on the data?
Organizational Assessment Process

1. Set Goals, People Responsible & Timelines
2. Take Action
3. Gather Data
4. Analyze Processes and Outcomes
5. Make Adjustments
Four Levels of Data

1. Organizational
2. Unit
3. Team
4. Individual
Where to Start: Macro to Micro

**Structure**: An agency or department providing customized employment will be structured differently than sheltered workshop.

**Process**: Creation of processes should align with the structure.

**People**: Agency workforce need to be competent and confident in their work to be successful.
# What to Measure

## Quantitative
- Funding opportunities
- Business Partners
- Community Partners
- Individual Outcomes
- Hours and Wages
- Individual Status in CE
- Staff Development
- Credentialed Staff
- Billable hours on CE

## Qualitative
- Funder Satisfaction
- Family Satisfaction
- Staff Satisfaction
- Job Seeker Satisfaction
- Employer Satisfaction
- Staff seeking out professional development
- CQL Outcomes

## Macro

## Micro
Poll Question #3: What Assessment Tools Do You Use?

Check all that apply:

- An electronic Case Management System
- A staff Timekeeping System
- State Data reporting and Billing System
- Online survey tools
- External Quality Assurance System
- Other? (Please name)
# From Complex . . .

<table>
<thead>
<tr>
<th>Job Seeker</th>
<th>Initial Convos</th>
<th>Presentation of Discovery PPT</th>
<th>Initial Home Visit</th>
<th>Discovery Activities/Interviews</th>
<th>4 Quadrants</th>
<th>V. Resume Creation</th>
<th>Employment Plan Meeting</th>
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To Rich Qualitative (Descriptive) Information

e.g., **Quality of Life Indicators:**

- Respectful Adult Roles, Image, and Contributions
- Competence, Autonomy, and Control
- Social Engagement & Sustained Relationships
- Overall Satisfaction
**HOW HAS THIS INDIVIDUAL’S LIFE CHANGED IN THE LAST MONTH?**

<table>
<thead>
<tr>
<th>DESIRED OUTCOMES</th>
<th>NARRATIVE EVIDENCE</th>
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<tbody>
<tr>
<td>1. COMMUNITY MEMBERSHIP/CITIZENSHIP</td>
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<td>• # hours reduced in ADT &amp; # hours increased in community in last month.</td>
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<td>• Specific staff activities:</td>
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<td>• Individual outcomes:</td>
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<td>• Next steps:</td>
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<td>2. EMPLOYMENT &amp;/or EDUCATION</td>
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<tr>
<td>• Is this a priority area for change?</td>
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<td>• Specific staff activities:</td>
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<td>• Individual outcomes:</td>
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<td>• Next steps:</td>
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To Simple Evaluation Tools . . .

1. Bullseye- Right on
2. Very Helpful
3. Useful
4. Average
5. I’ve been to better
6. Wouldn’t recommend this
Great  OK  Not so Good
Process for Measuring Progress

- **People served** – Share info in understandable formats & celebrate progress.
- **Staff meetings** – Discuss progress on each goal, obstacles, support needs, and next steps.
- **Management meetings** – Standard agenda item in meetings with managers who report on their areas of responsibility.
- **Board meetings** – Provide progress reports at regular, agreed upon junctures.
- **Parent/guardian/family communication** – Individually in relation to person served, via website and newsletters, at fundraisers, etc.
- **Funders** – Engage funders by sharing your progress accompanied by data and anecdotal information.
Supporting Your Workforce to Collect Data

- Emphasize the NEED for and VALUE of Data.
- Set expectations for WHEN to submit data, to whom & in what format.
- Provide Professional Development to Model How to Collect, Analyze, & Use Data.

- Have staff lead discussions about data (outcomes) and next steps.
- Maintain a sense of URGENCY regarding Outcomes.
How to Tell The Story

Newsletters
Social Media
Funding Stories
Bring your Legislator to Work
Family Meetings
Tours
Photos
Group Texts to Celebrate
Next Steps

How do you keep the fire burning?

- Gather a cohort
- Collaborate with others
- Apply for grants
- Present at conferences
- Celebrate!!

GREAT THINGS NEVER COME FROM COMFORT ZONES
## Contact Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Phone Number</th>
<th>Email</th>
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</thead>
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Webinar #6 Survey Reminders

Pre: https://www.surveymonkey.com/r/Z39FH3G

Post: https://www.surveymonkey.com/r/Z3TZLC6