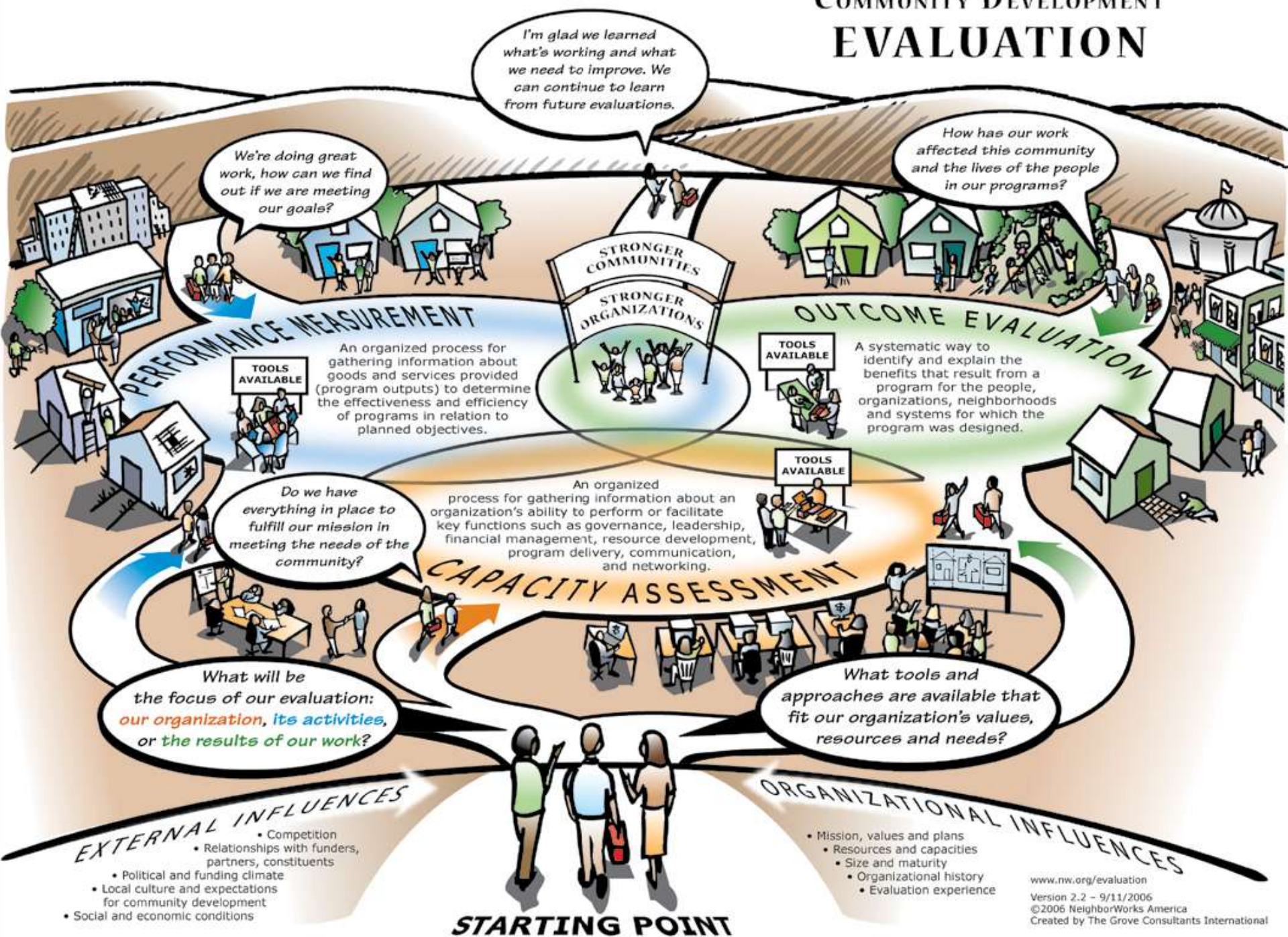


Measuring Success: Tools You Can Use

Success Measures
a resource for
participatory outcome evaluation

COMMUNITY DEVELOPMENT EVALUATION



Success Measures is. . .

- Participatory outcome-based evaluation approach
- Indicators & data collection tools measuring CD outcomes
- Web-based data system
- Training and TA program

Success Measures Evolution

- 1997 - 1999** **Regional/national dialogues to design method and common outcome measures**
More than 300 CD practitioners, funders
- 1999 - 2002** **Field test of method, indicators & tools**
50 organizations, intermediaries, researchers
- 2003 - 2004** **Success Measures Data System**
Web-based access to shared indicators/data tools, data management, aggregation and sharing
- 2005 - 2010** **National implementation**
Supported 300+ community-based organizations and 25 sponsoring funders to conduct evaluations; developed streamlined process for creating shared indicators and data tools for new program areas

Indicators and Tools

- Design evaluations by selecting from menu of indicators & data collection tools
 - Affordable housing
 - Economic development
 - Community-building and revitalization
 - Financial capability
 - Green housing and communities
 - Community Stabilization
 - Value of intermediary services (technical assistance, capacity-building, policy/advocacy)

Training and Technical Assistance

- On-line training sessions
 - Planning
 - Data Collection
 - Data Analysis
 - Communicating Results
- Coaching to support evaluation
- Focus on integration into ongoing programs of longitudinal measurement

Success Measures Data System

- Web-based service provides:
 - Process Guidance
 - Success Measures Indicators
 - Data Collection Tools
 - Data Tabulation and Aggregation
 - Data Storage
 - Data Export to Excel
 - Options to add new indicators and data tools

Sample from Community Survey

11. Please indicate how likely you think it is that people in this community would help out if the following occurred.



	Very likely	Likely	Some-what likely	Not very likely	Not at all likely
I needed a ride somewhere.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A package was delivered when I was not at home and it needed to be accepted.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I needed a favor, such as picking up mail or borrowing a tool.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I needed someone to watch my house when I was away.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An elderly neighbor needed someone to periodically check on him or her.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A neighbor needed someone to take care of a child in an emergency.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



How is Success Measures Used?

- By individual organizations to measure self-defined outcomes
- By cohorts of organizations using a common framework for common programs/strategies
- By funders/intermediaries using common elements for organizations in a specific program

Self-defined outcomes

- How does CDC's acquisition, rehab and on-going management of portfolio of rental properties contribute to the surrounding community in terms of:
 - Economic benefits
 - Quality of life: safety, housing conditions, perceptions of the neighborhood

Findings

The economic value of CDC's construction and rehabilitation:

- Total value (cost) of construction at the 5 properties combined, excluding land: \$18,192,230
- Local business income: \$2,237,159
- Local wages and salaries: \$9,530,602
- Total local income from construction: \$11,767,760
- Taxes and fees from construction: \$1,394,075
- Local jobs (FTE) in construction and related industries: 142

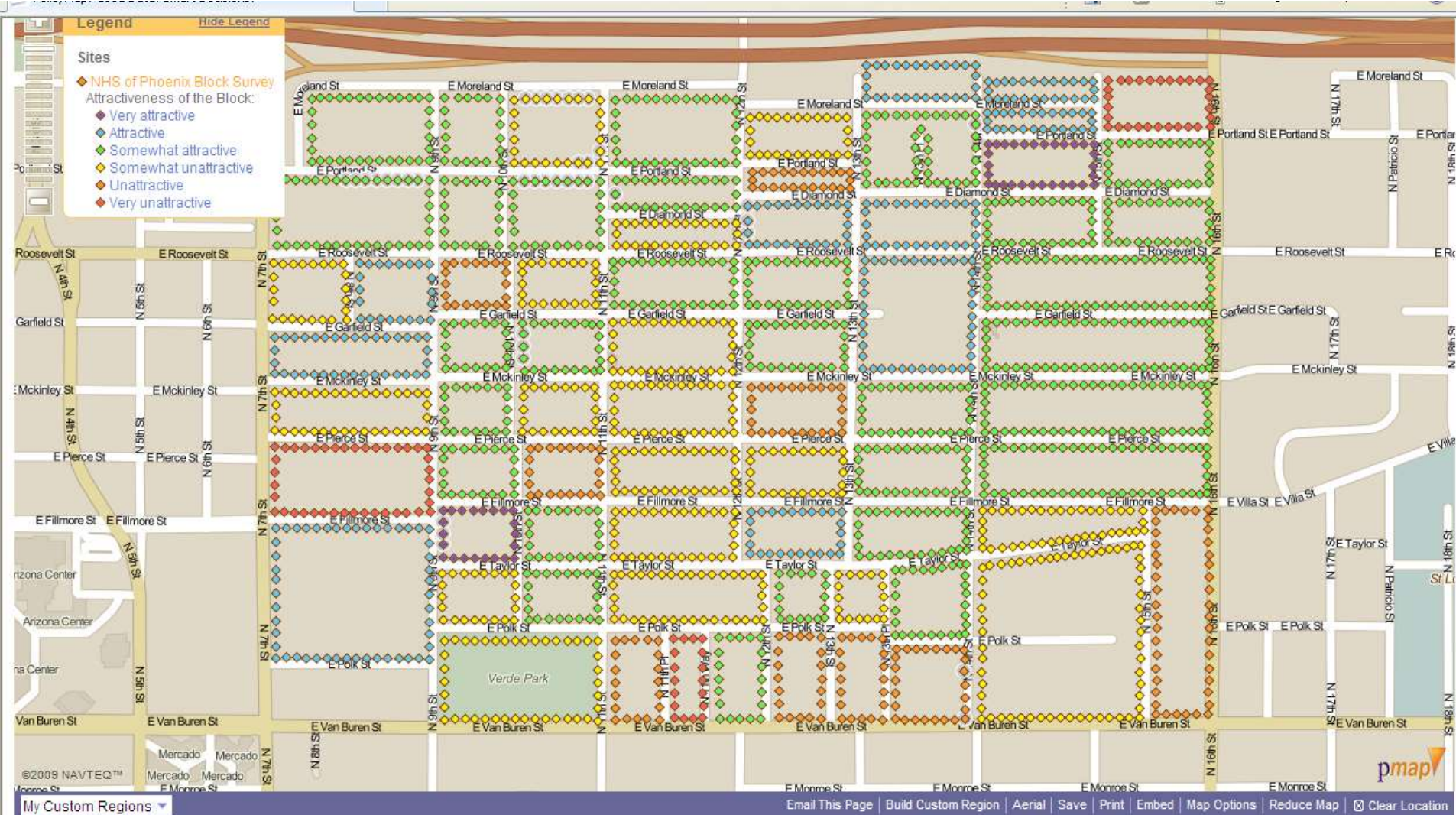
Findings

- **Property values in adjacent neighborhood increased 16% since CDC began work**
- **88% of residents feel safe in their homes, though varies by location**
- **Perception of the neighborhood (key informants) :**
 - 77% respondents indicated target community was “Better” than 3 years earlier
 - All respondents who indicated community was “Better” said that the quality of housing improved, the community was safer, or mentioned the CDC as specifically contributing to the improvement of the community as a whole.
 - 89% thought buying a home in the specific neighborhood is now a good investment.

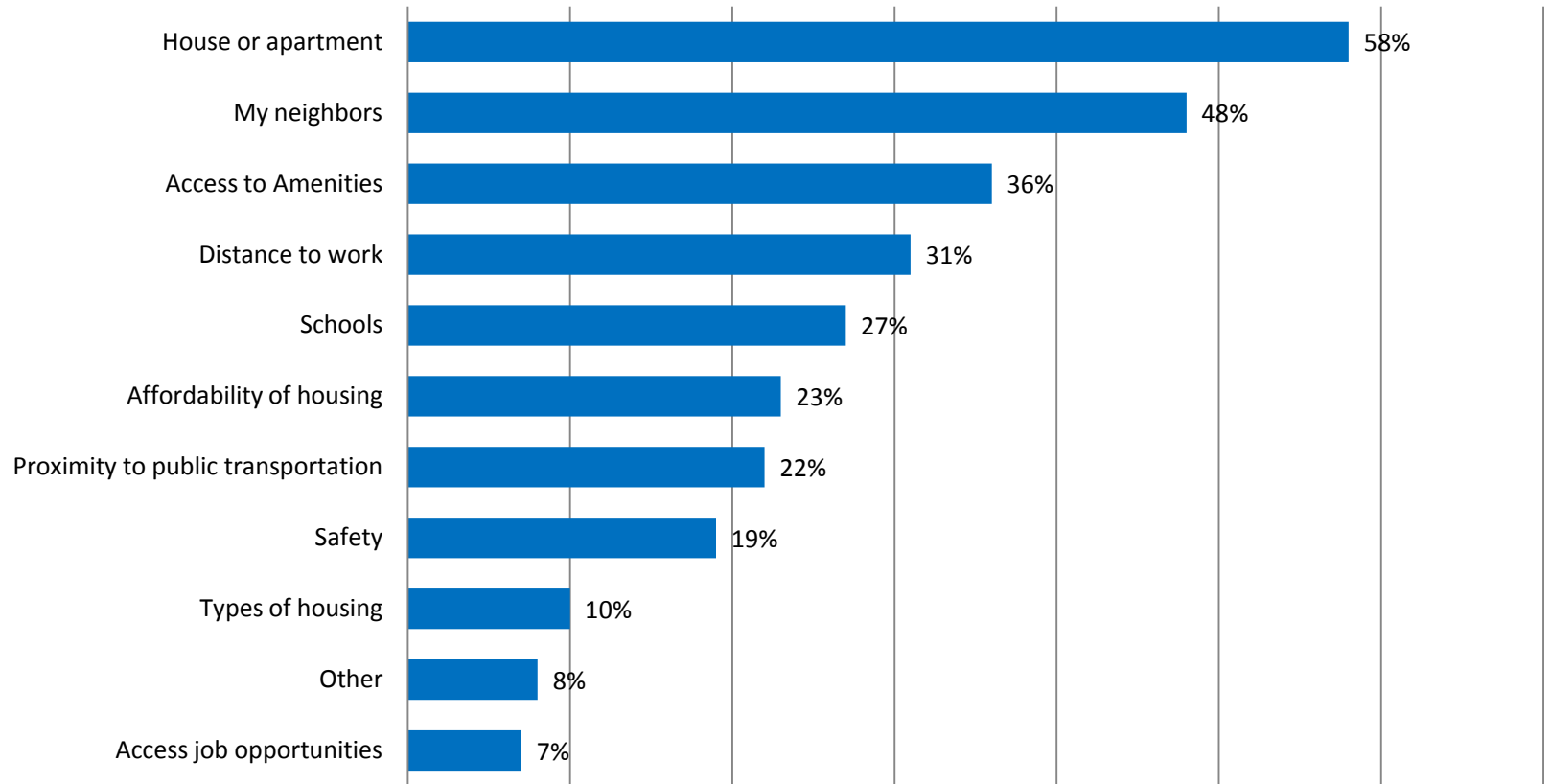
Common Framework- Community Stabilization

- **Community Characteristics**—A set of secondary data to frame the context of the community
- **Community Image, Confidence & Management**—A resident survey and key informant interview to understand internal and external perceptions of the community
- **Community Physical Conditions**—A set of observation tools at the block and parcel levels coordinated with some secondary data and an analysis framework to measure change over time to the physical conditions of the community as well as determine which properties, if any, are reasonable to obtain and rehab.
- **Market Health**—A set of secondary data to address the market health of a community

Phoenix: Block Conditions

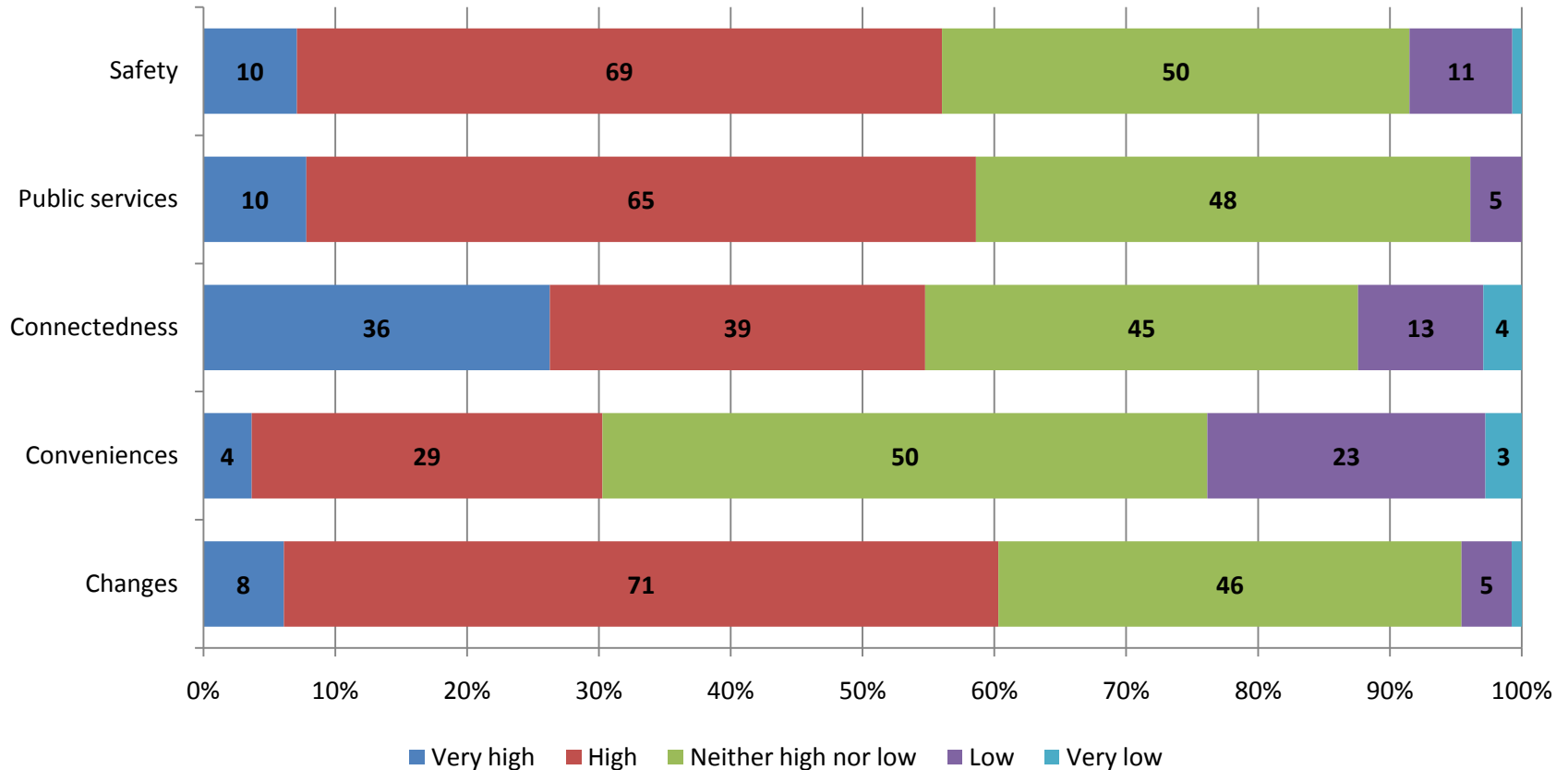


Characteristics Residents Like Best About the Community (Respondents were asked to select 3 characteristics)



Perception Scores for Garfield

Perceptions of Safety, Public Services, Connectedness, Conveniences and Change in Garfield



Working Together for Strong Communities



Learnings

- From the process
 - Myth versus reality
 - Organization's connection to community
- From the results
 - Conditions of target area
 - Residents' perception of community differs from outsiders' perceptions
 - Strategic implications for strategy and marketing

Funder/Intermediary Framework

- Wells Fargo Regional Foundation
 - Case study in *Foundation Review*, 2010
volume 2:2
- Habitat for Humanity-Neighborhood Revitalization Initiative
- CITI Foundation Financial Capability Program

SUCCESS MEASURES FINANCIAL CAPABILITY INDICATORS FRAMEWORK

F1. Individual/Family/Household Background Information

Size and composition of household and characteristics of household members.

F 1.1: Household Composition

F 1.2: Financial Education ~ Part1 and Part 2

F 1.3: Financial Support for Others

F 2: Individual/Family/Household Financial Status

F 2.1: Income and Expenses

F 2.2: Net Worth

F 2.3: Asset Cushion ~ Part1 and Part 2

F 3: Financial Behavior

Document change in financial behavior related to key areas that contribute to a person's long-term financial well being.

F 3.1: Saving Behavior

F 3.2: Spending Behavior

F 3.3: Managing Debt

F 3.4: Building and Managing Credit

F 3.5: Response to Financial Change

F 3.6: Strategic Use of Formal Financial Resources

F 3.7: Bill Payment Behavior

F 4: Financial Attitudes

Document change in attitudes, values, and beliefs that will support long-term financial stability, security, and wealth creation.

F 4.1: Attitudes Toward Saving

F 4.2: Attitudes Toward Spending

F 4.3: Attitudes Toward Credit and Debt

F 4.4: Attitudes Toward Financial Situation and Financial Future

F 4.5: Attitudes Toward Use of Financial Resources

F 4.6: Attitudes Toward Having Enough

F 4.7: Attitudes Toward Homeownership

F 4.8: Attitudes Toward Entrepreneurship

F 5: Non-Financial Characteristics

F 5.1: Training and Educational Attainment

F 5.2: Sense of Well Being

F 5.3: Family and Household Dynamics

F 5.4: Civic Engagement and Political Participation

F 6: Informal and Communal Assets

F 6.1: Social Networks and Informal Exchange

F 6.2: Communally Held Assets

F 7: Foreclosure Mitigation

F 7.1: Status of Mortgage

F 7.2: Experience with Counseling Services

Questions?

- Brooke Finn bfinn@nw.org
- Debby Visser dvisser@nw.org
- Success Measures information
www.nw.org
- Success Measures Website
www.successmeasures.org