Demonstrating Impact:
Tracking Clients’ Progress Toward Economic Security

Webinar
March 27, 2013
1:00-2:30 p.m. PST

For Technical Webinar Help, call: 800-263-6317
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Today’s Webinar

GOALS

- Enhanced understanding of key economic metrics
  +
- Inspire new and continued efforts to measure and demonstrate the impact of our work.
  =

Greater client progress toward economic security
Paul Downey
President/CEO
Senior Community Centers

Aimee Durfee
Senior Program Officer
Y & H Soda Foundation

Elizabeth de Renzy
Research and Public Policy Manager
Women’s Initiative for Self Employment
California Economic Metrics Comparisons
(3-person non-elderly family)

$54,438

3 full-time min. wage jobs
(at $8.00/hr) $49,920

40 hour per week job
at $26.17/hr $54,438

$19,530

$26,207

$16,640

$16,640

$16,640

Federal Poverty Guidelines (2013)
*Median Supplemental Poverty Measure (2011)
Full-Time Minimum Wage Job (2013)
**Median Self-Sufficiency Standard (2011)

(Notes: *This CA-specific Supplemental Poverty Measure is for a 1 adult, 2 child household, and is based on provisional estimates provided by Christopher Wimer at the Stanford Center on Poverty and Inequality. **This Self-Sufficiency Standard is for a household of 1 adult with a preschooler and a school age child; it includes the net effect of the addition of the child care and child tax credits and the subtraction of taxes.)
California Economic Metrics Comparisons
(Elder Renter, Living Alone)

Federal Poverty Guidelines (2013) $11,490
*Median Supplemental Poverty Measure (2011) $14,268
Median Annual Social Security Payment (2009) $11,640
Median Elder Index (2010) $21,545

(Notes: *This CA-specific Supplemental Poverty Measure is for an elder renter, and is based on provisional estimates provided by Christopher Wimer at the Stanford Center on Poverty and Inequality.)
## Self-Sufficiency Standard (2011)

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<tr>
<th>Monthly Expenses</th>
<th>Alameda County</th>
<th>Tulare County</th>
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<tbody>
<tr>
<td></td>
<td>One Adult</td>
<td>One Adult, Preschooler, School-age Child</td>
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<tr>
<td>Housing</td>
<td>$1,153</td>
<td>$1,366</td>
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<td>Taxes minus Credits</td>
<td>$416</td>
<td>$752</td>
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<td><strong>Family Standard Per Hour (per adult)</strong></td>
<td><strong>$13.00</strong></td>
<td><strong>$30.15</strong></td>
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<td><strong>Family Standard Per Year</strong></td>
<td><strong>$27,456</strong></td>
<td><strong>$63,674</strong></td>
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## Elder Index (2010)

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<th>Monthly Expenses</th>
<th>San Diego County</th>
<th>Humboldt County</th>
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<td>Owner w/o Mortgage</td>
<td>Renter, One Bedroom</td>
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<td>Housing</td>
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<tr>
<td>Transportation</td>
<td>$214</td>
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<tr>
<td>Health Care = Good</td>
<td>$182</td>
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<td>Miscellaneous @ 20%</td>
<td>$213</td>
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<td><strong>Elder Standard Index Per Month</strong></td>
<td><strong>$1,278</strong></td>
<td><strong>$1,965</strong></td>
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<td><strong>Elder Standard Index Per Year</strong></td>
<td><strong>$15,337</strong></td>
<td><strong>$23,586</strong></td>
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Program Snapshot:

- Meals (OAA) – 525,000 annually delivered to 10 senior centers and home delivered meal clients.
- Case Management
- Healthcare – wireless technology
- Mental Health Care
- Transitional Housing for Homeless Seniors – 30 units
- Permanent Supportive Housing – 350 units
- Civic Engagement
- Activities
Gary and Mary West Senior Wellness Center
Service Model

Serving Vulnerable Seniors with compassion and dignity.
Supporting advocacy and empowerment, using an innovative and solution-driven model. Services are holistic, comprehensive and interdisciplinary as well as culturally and linguistically competent.

**Health and Wellness (Mental Health) Services**
- Mental Health Case Management
  - Assessment
  - Medication
  - Crisis Intervention
  - Monitoring
  - Mental Health Support Services
  - Referrals
  - UCSD Bridge to Recovery
  - Sharp Senior Health

**Nutrition**
- Meals and Education
  - Nutritious meals (onsite)
  - Education & Seminars
  - Outreach
  - Referrals
  - Home Delivered Meals
  - Interns

**Transitional Housing**
- Case Management
  - Assessment & Education
  - Entitlement Procurement
  - Referrals
  - Crisis Intervention
  - Transitional Housing
  - Interns

**Supportive Housing**
- Supportive Housing Services
  - Assessment
  - Case Management
  - Referrals
  - Social Activities
  - Relationship Building
  - Eviction Intervention
  - Interns

**Health and Wellness (Physical Health) Services**
- Nurse Case Management
  - Assessment
  - Treatment Planning
  - Education
  - Monitoring
  - Medication
  - Crisis Intervention
  - Referrals
  - SDSU Clinic Interns
  - Nursing Internship Program
  - Interns

**Lifelong Learning & Civic Engagement**
- Education and Engagement
  - Classes
  - Cyber Café
  - Social Activities
  - Civic Engagement
  - Community Outreach
  - Classes by Sharp Healthcare, Oasis and the Consumer Center for Health Education and Advocacy Interns

**Social Services**
- Social Work Services
  - Information & Referral
  - Assessment
  - Case Management
  - Home Visits
  - Crisis Intervention
  - Referrals
  - Outreach
  - SDSU Interns
  - Senior Legal Services
  - Access to Independence Interns

**MISSION**
End senior poverty and hunger through innovative solutions

Senior advocacy and empowerment is at the core of all Gary and Mary West Wellness Center Services. Staff and leadership advocate for seniors at the city, state and national levels. Knowledge from the Center is used to guide policies that support care for vulnerable seniors.
Demographic Snapshot:

- Over 3,000 seniors per day through our facilities
- 75% at or below the FPL
- Remaining 25% fall into the Elder Index “gap”
- Mostly urban seniors living in SRO’s
  - Rents account for 70-80% of monthly income
  - Limited or no family Support
- Over 50% of seniors are ethnic minorities
  - Latino -- 20%
  - Asian (Chinese/Filipino) – 25%
  - African-American – 9%
Logic Model

Input → Activities → Outputs

Impact is Accomplishing Your Mission → Impact → Outcomes

Impact is Accomplishing Your Mission
Logic Model – Nutrition Program

Inputs (Issues and Resources)
- Hungry Seniors (will get estimate from AIS)
- Home-Delivered Meals
- Congregate Meals
- HDM Drivers (9)
- Congregate Staff (40+)
- Congregate Dining Sites (10)
- Discharge Planners

Activities (Brainstorming)
- Develop and implement an outreach plan to more seniors (200)
- Develop and use educational tools on healthy diets
- Develop nutritional recipes that meet optimal nutritional guidelines
- Conduct surveys to seniors regarding food they enjoy
- Provide literature on healthy diets
- Provide nutritious meals to more seniors
- Provide meals that taste good

Outputs (What SCC Provides)
- Provide outreach to educate seniors about congregate/HD meals
- Provide outreach to healthcare/social service providers
- Deliver classes/seminars on healthy diets
- Senior attends classes/seminars on healthy diets
- Senior receives literature on healthy diets
- Senior enjoys the meal

Outcomes (Senior's participation)
- The number of seniors eating congregate/HD meals increases
- Senior attends classes/seminars on healthy diets
- Senior receives literature on healthy diets
- Senior eats meal
- Senior enjoys the meal

Short Term Impact
- Senior increases socialization
- Senior decreases hunger
- Senior increases knowledge about healthy diets
- Senior is motivated to eat more meals

Longer Term Impact
- Senior eats more meals on a consistent basis
- Senior decreases hunger
- Senior increases knowledge about healthy diets
- Senior's nutritional score increase

Long-Term Impact
- Senior's overall health increases
- Senior improves and maintains a healthy diet
- Senior's nutritional score increase
- Decrease in senior's malnutrition
- Increase Health of San Diego seniors
- Decrease/ prevent senior hunger
- Decreases demand for higher levels of care/emergency services
- Reduces costs of senior care for the broader community
Data collection is key to impact:

– Scan cards track all activities
– Uploaded into Efforts to Outcomes (ETO)
– Able to determine Social ROI
An Example of Program Impact:

**Elder Index (San Diego) for Renter:** $23,586

- Potiker Family Senior Residence (200 units with supportive housing services)
  - Income limits: $26,656 to 34,155 (35% to 45% AMI)
  - Average Rent: $500 -- or about $500 less than market
  - Affordable housing economic impact: $6,000/year

- Older Americans Act Meals (2x/day): $1,900/year

- Senior Bus Pass: $216/year

- A senior living in an affordable housing complex and receiving meals needs to earn about $15,470 for his/her basic needs to be met, rather than $23,586. This demonstrates the importance of affordable housing and meals.
Uses of Elder Index:

- Telling the story – we have lots of anecdotal examples of the impact of poverty, the elder index gives us empirical data
- Advocacy
- Fundraising
- Strategic Planning
  - Own agency
  - Triple A planning (AB 138)
  - Target best use of scarce resources
Contact:

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Y & H Soda Foundation

- Family Economic Success

- Soda Foundation FES grants focused on:
  - Increasing household income to self-sufficiency
  - Increasing household assets

- Two counties – Alameda and Contra Costa

- About $2m granted out each year
East Bay SSS Range

- Self-Sufficiency Standard (SSS) for single adult in Alameda/Contra Costa:
  - 2011: $13.00 - $13.39 per hour

- SSS for single adult with 1-2 children:
  - 2011: $17.42 - $36.52 per hour
Reporting

- What we did ask grantees to report:
  - Job placement wage
  - Number of job placements

- What we did not ask grantees to report:
  - Household size of clients
  - Whether the client met their own SSS level at the conclusion of the program
Grantee Reported Job Placements by Average Hourly Wage Rate

Number of Job Placements

Hourly Wage

Legend:
- Red diamond: Federal Poverty Level / Minimum Wage Jobs
- Yellow square: Single Adult Self Sufficiency Wage Jobs
- Green diamond: One Adult with 1-2 Children Self Sufficiency Wage Jobs
What We Learned

- Difference in outcomes does **not** depend on:
  - Organizational ability to run programs

- It **does** depend on a combination of factors:
  - Target occupation: What occupation & wage does the training program prepare clients for?
  - Client population: Do clients have many barriers or are they easily employable? What is client current skill level?
  - Program strategy: industry sector training model or general job placement?
At the Soda Foundation, we are:

- Exploring multi-year funding that allows for longer time spent with clients after initial job is secured - add skills upgrade and career coaching?

- Learning more about local child care access and transportation initiatives.

- Staying connected to trends in the job training, community college and basic skills systems in California to see where we can add value.
Contact Info

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adurfee@yhsodafoundation.org
WOMEN’S INITIATIVE
Measuring Impact

Women’s Initiative for Self Employment
www.womensinitiative.org
ABOUT US

- Founded in 1988
- Nonprofit microenterprise organization
- Serving the San Francisco Bay Area and New York City
  - Nearly 8,000 women have started and grown their businesses.
  - More than 12,000 local jobs have been created or retained.
  - Nearly $5 billion has been returned to the local economy.
HOW WE USE DATA TO ACHIEVE OUR MISSION

- Agency dashboard
- Program development
- Fundraising and reporting
- Marketing and outreach
- Public Policy
## PROGRAM DASHBOARD

### 2013 Dashboard
**Agency-wide**

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<th>Programmatic</th>
<th>YTD Goal</th>
<th>YTD Actual</th>
<th>Yearly Goal</th>
<th>Jan</th>
<th>Feb</th>
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<th>Apr</th>
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**Legend**
- **Green**: Celebrate! 100% of goal achieved
- **Yellow**: Monitor. 80-99% of goal achieved
- **Red**: Act now. Less than 80% of goal achieved
IMPACT MEASURES

- Economic security
  - Economic self-sufficiency
  - Assets/debt

- Community Development
  - Business growth
  - Job creation

- Leadership
  - Volunteerism and mentoring
  - Advocacy

- Empowerment of Women
  - Confidence
  - Self-control
HOW WE ARE USING IMPACT MEASURES FOR PROGRAM DEVELOPMENT

Before
Economic self sufficiency

SuccessLink
Action groups
Coaching & consulting
Seminars & workshops
Access to markets

After
Economic self sufficiency
RESEARCH QUESTIONS

- Do SuccessLink members experience improvements in economic self-sufficiency?

- Who experiences the greatest improvements in economic self-sufficiency?
  - Business type, phase, size, age, etc.

- Which utilization patterns are related to the greatest improvements in economic self-sufficiency?
  - Order, combination, intensity, frequency, etc. of SL utilization

- For whom are specific utilization patterns related to the greatest improvements in economic self-sufficiency?
  - Business type, phase, size, age, etc.
THANK YOU

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Celebrating 25 Years of Empowering Women Entrepreneurs
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