# Program Evaluation and Data Culture in Resident Services

by

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Northwest Housing Alternatives

Evaluation Into Action

EMPOWERING NONPROFITS THROUGH DATA

Designed by Katie Ash, Northwest Housing Alternatives

# Introduction

Northwest Housing Alternatives' Resident Services team wanted to engage in a formal program evaluation to improve our data tracking, help tell our story, and increase our grant funding. We had difficulty communicating the impact of our work, and found that people sometimes didn't understand what we were doing and why we were doing it. The data we were collecting weren't effective.

In 2016, we contracted with Evaluation into Action (EIA) to create an evaluation system for our program. This 6-month process resulted in an increased ability to effectively communicate our impact, to accurately describe our services, and to explain why we offer these services. In fact, the data helped us secure two of our largest grants to date. The success of this process is demonstrated through our ongoing ability to gather data that are relevant to our work and to use them to continually improve our program. We have data collection tools to gather data on a regular basis. The data inform our work as well as clearly demonstrate our impact to key stakeholders.

Concurrent to this process, we had also begun implementing a new web-based database to track and monitor our activities. The evaluation process helped to clarify what data to track and to create a user-friendly database for our staff.

This case study outlines key steps in our process in three areas:

1. Planning
2. Implementation
3. Results

# Planning

**"The ways in which your nonprofit organization feels and thinks about evaluation will dictate their attitudes and behaviors toward it. Is your organization doing evaluation because of a required mandate from funders or because of a desire to learn from the insights data provides?" [1]**

Evaluation into Action uses a participatory approach to ensure all stakeholders are included in the process and, therefore, have ownership. Some staff members were initially hesitant about this process, with the concerns that it would be too time consuming and the data would not be useful. Others had prior negative experiences that shaped these attitudes. These concerns were valid and understandable. The honest comments that staff members shared in an initial evaluation opinion survey helped with understanding their attitude toward program evaluation which, in turn, helped inform the path to shift these beliefs.

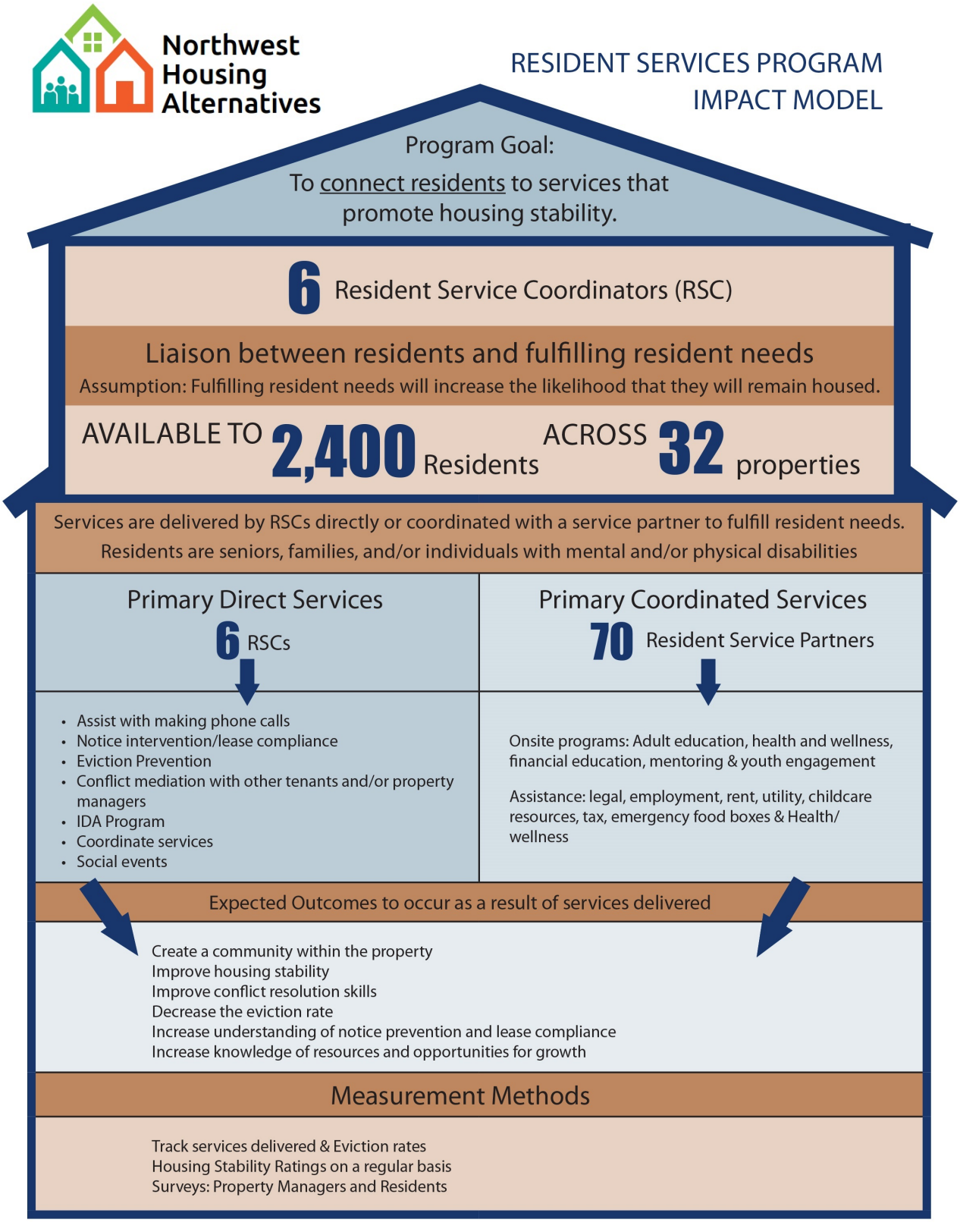
As described in Building a Culture of Evaluation, there are three steps to shift to a culture of evaluation: validate, educate, and collaborate. Evaluation into Action validated these current attitudes toward evaluation in a staff meeting. The opportunity to educate staff on the Evaluation into Action approach, which is focused on what is realistic as well as meaningful to evaluate, helped to shift the mindset from one of "we have to do this," to "we want to understand how data can help us effectively reach our goal." Finally, a commitment to collaborate on defining key evaluation elements, including the program goal, activities, and outcomes, shifted staff toward a culture of evaluation.

The initial discussions with staff, a review of written materials, and staff opinion survey results informed the agenda for an evaluation planning session. This interactive session focused on aligning the following three questions:

| | |
|---|---|
| Goals: | What is our dream for the program? |
| Activities: | What do we do to achieve this goal(s)? |
| Outcomes: | What measurable changes are expected as a result of these activities? |

[1] "Building a Culture of Evaluation" white paper (2017) by Chari Smith and Elaine Charpentier Philippi.

The alignment of these three responses provided the cornerstone of the evaluation plan. The result was an impact model that visually summarizes the goal, activities, and outcomes for this program.



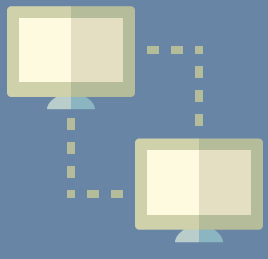
# Implementation

The measurement methods standardized how all resident service coordinators collect data. Evaluation into Action created the data collection tools, as well as defined the process of when, by whom, and how data should be collected. This gave us a clear path to implementing the program evaluation plan.

1. Impact Measurement Tool
2. Data Tracking
3. Training Staff

Our primary program goal is to promote housing stability; therefore, we needed to clearly communicate how we were accomplishing that objective. Evaluation into Action conducted a literature review on how housing stability is defined and measured nationally within Resident Services. Results showed that neither a standard definition nor a clear measurement method to truly measure housing stability exists. Evaluation into Action created a housing stability assessment customized to our program. This tool has become an integral part of our program operations, guiding us to understand what activities will best meet the needs of each resident.

The new database was designed to track the intake process, service forms, event attendance, move in/move out, and other relevant monitoring needs on an ongoing basis. The Housing Stability Assessment was also designed to be administered through the database, allowing us to cross-reference the rating with other factors, such as service requests, move-out data, and demographic factors. Resident Services Coordinators (RSCs) enter data on a daily basis, allowing for us to see an aggregate picture at any time on any variable or to hone in on a specific property or resident to guide program activities.



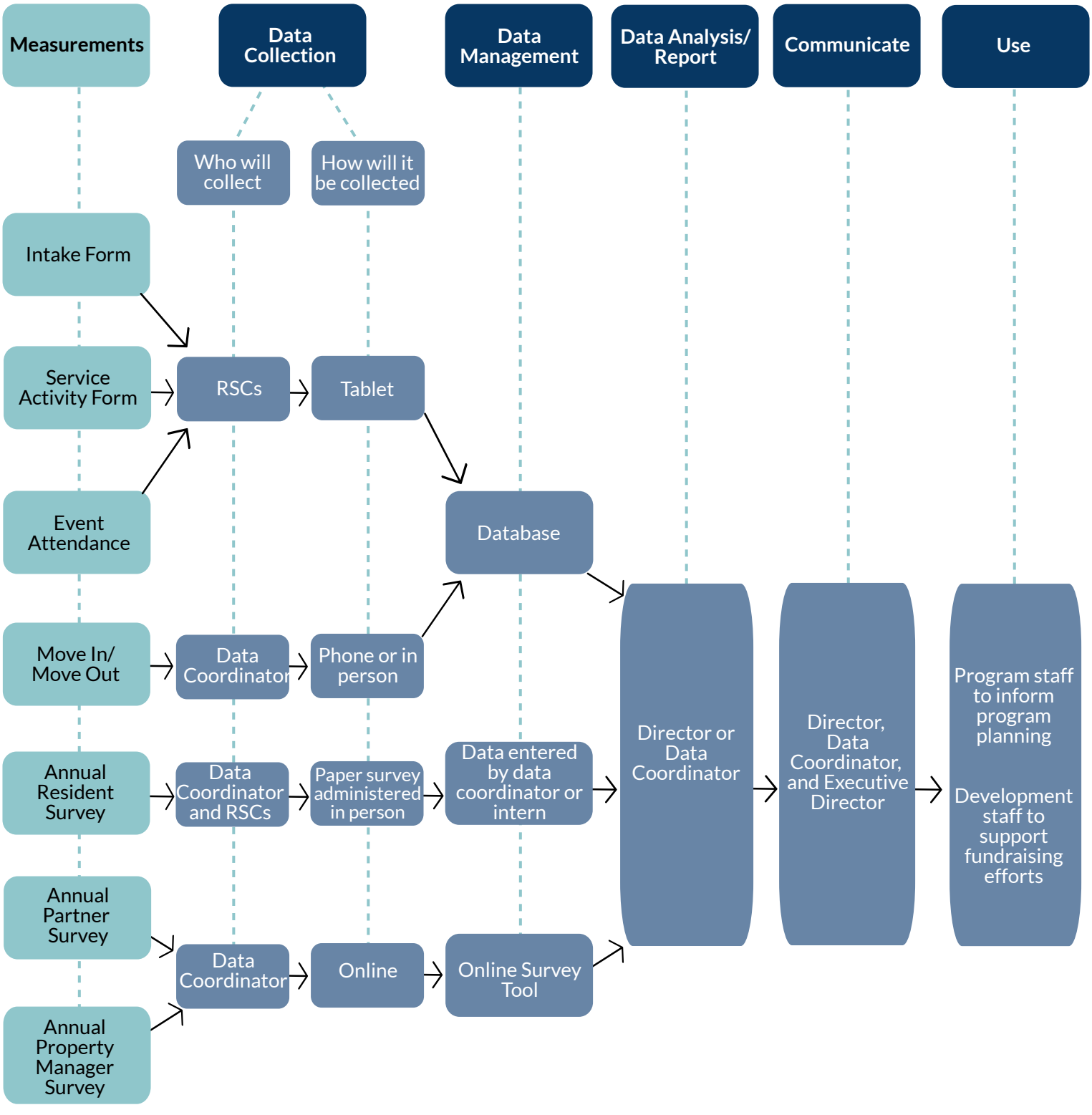
Our choice of database took into consideration these factors: ease of use, cost, and ability to easily pull information and cross-reference data points. The most important consideration was malleability; we needed a database that could be designed exactly as we envisioned it and continue to be adapted as our program shifted and changed. We contracted with Exponent Partners to utilize their Exponent Case Management (ECM) application.

The flexibility of this program has allowed us to glean a tremendous amount of insight into our impact. For example, we were able to determine that the average stability level of NHA households requesting services is 2.55 on a scale of 1 (low risk of losing housing) to 5 (high risk of losing housing). However, we can isolate housing stability data at specific properties to identify whether the community is more or less stable, and adjust intervention strategies and program planning accordingly.

Evaluation into Action administered property manager and service partner surveys online. Resident surveys were administered by the Resident Services Coordinators at each property. Evaluation into Action provided training and survey administration materials to ensure the resident survey was administered consistently across all properties.

# Resident Services Program: Evaluation Activities Workflow

**The workflow figure below illustrates how the evaluation activities were initially implemented. An evaluation plan defines the methodology to employ as well as who will oversee plan implementation.**




**Northwest Housing Alternatives: Resident Services Program. Evaluation Plan, February 9, 2017. (internal document)**

# Results

**In addition to focusing a program's data collection and outcomes, the evaluation process can also inform a program's culture by using a lens of assessment that applies to a range of daily practices. Northwest Housing Alternatives' Resident Services program experienced a culture shift as a result of program evaluation that was evident both internally and externally.**

## Measuring Housing Stability

From no assessment of impact → To Housing Stability Assessment

**Assess stability based on requests for services, program participation, lease violation notices, etc. Resident Services Coordinator directly performs assessment based on these factors after first service request, then every three service requests after that or every six months. This allows us to establish baseline, change over time, and end point for those residents who only need one intervention. Assessing housing stability over time allows us to offer the appropriate intervention to each household.**

Example: **Percentage of residents who maintain and improve in housing stability over time**

## Program Improvement

From reactive interventions → To proactive interventions

**Based on a household's Housing Stability Assessment, we offer specific services and resources that help the household stabilize, avoid eviction, and/or access opportunities for growth. Whereas our prior intervention strategy was to have a resident household approach us with a need, we now are able to distill available resources to focus on just those that are most applicable and helpful to that specific household.**

Example: **Low risk of housing instability = IDA, asset building, etc. High risk of housing instability = service coordination, lease compliance education, basic needs, etc.**

# Demonstrating Impact

From outputs → To outcomes

**Program evaluation expanded our data tracking practices tremendously, while allowing us to cut out extraneous data points that were not contributing to our reporting. Data points that do not convey the change in a household as a result of our intervention are no longer tracked. Outcomes come from self-reporting (surveys), Housing Stability Assessments, and tracking of daily RSC activities.**

Example: **Number of service requests fulfilled per year vs. percentage of residents who had a service request fulfilled and improved their housing stability rating as a result**

# Communications

From annual reporting as a response to individual queries → To proactively reporting throughout the year

**By refining our data tracking and focusing on targeted outcomes, we are able to measure household progress over time and examine outcomes both individually and program-wide. This allows for ongoing reporting that helps key stakeholders to better understand the program.**

Example: **Grant reporting vs. Annual Survey Report produced for general public consumption**

# What's Next?

**NHA's Resident Services team revisits our outcomes annually to ensure they are still relevant and adjusts our data collection questions and methods accordingly.**

**Based on outcomes data, we can make changes to program implementation that help our residents achieve the highest level of success in our housing.**

# About the Authors

## About NHA

Northwest Housing Alternatives is a private nonprofit organization which builds and develops affordable housing for seniors, families, and people with disabilities. NHA's mission is to create opportunity through housing, and their portfolio includes more than 1,800 units in 16 Oregon counties. Visit NWhousing.org for more information. Stay up to date with the latest affordable housing news at www.facebook.com/NWhousing.

## About Julia Doty

Julia Doty is the Director of Resident Services for Northwest Housing Alternatives. Prior to that, she spent five years providing Resident Services to NHA's senior properties. She is one of the developers of the first trainings in Oregon for new Resident Services Coordinators. She has served as facilitator for Oregon's Resident Services Peer Learning Group and the Resident Services Statewide Advocacy Group.

## About Evaluation into Action

Evaluation into Action, founded by Chari Smith, empowers nonprofits to transform program evaluation into an action-focused, highly cost-effective practice that can increase your organization's capacity to accomplish its mission. Located in Portland, Oregon, we provide hands-on program evaluation services and also build internal skills with training, coaching, and technical assistance. Our pragmatic approach demystifies the program evaluation process, delivering a clear, actionable plan to achieve your goals.

Visit www.evaluationintoaction.com for more information, free resources, and our blog.

Stay Connected with Chari Smith
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Sign up @ www.evaluationintoaction.com for program evaluation news and resources.

Interested in program evaluation services? Contact hello@evaluationintoaction.com. We offer a range of services to ensure your program evaluation needs are met.

Check out Chari's book Nonprofit Program Evaluation Made Simple: Get your Data. Show your Impact. Improve your Programs. (January 2021). To stay up to date on events, resources, insights and news, sing up for the Evaluation into Action newsletter at www.evaluationintoaction.com.

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