

COMMUNITY OUTCOMES: CREATING POWERFUL AND ENGAGING REPORT CARDS

PHILADELPHIA, PA, SAN DIEGO, CA AND VERMONT

A MAKING CONNECTIONS
PEER TECHNICAL ASSISTANCE MATCH

FEBRUARY 24, 2000

**THE TECHNICAL ASSISTANCE RESOURCE CENTER
OF
THE ANNIE E. CASEY FOUNDATION
AND
THE CENTER FOR THE STUDY OF SOCIAL POLICY**

Background

Through the *Making Connections* initiative, the Annie E. Casey Foundation is working with Philadelphia and 21 other cities across the country to strengthen neighborhoods and support families by connecting them to the opportunities, social networks, and formal services that will improve their lives and well being. As part of this initiative to strengthen families in the neighborhood context, the Foundation, in partnership with the Center for the Study of Social Policy, is offering the 22 community sites access to a Peer Technical Assistance (TA) network.

The Peer TA network is a way of providing help to states and localities that are seeking improvements in results for children, youth and families. The Peer TA Network is based on the concept of “peer learning” which allows the sites to capitalize on the practical knowledge that emerges from peer innovators in other places. Colleagues working in states and communities share experiences, knowledge, skills and materials, and jointly develop solutions to common problems.

Recently, a peer technical assistance match brought together colleagues from Philadelphia, San Diego and Vermont. The match of these three sites was the result of conversations between the Casey Foundation, the Center for the Study of Social Policy and representatives of Philadelphia Safe and Sound: The City’s Campaign for Kids, the lead organization of the Philadelphia Coalition for Kids.

The Philadelphia Coalition for Kids, whose mission is to champion the health and safety of all of Philadelphia’s children, regardless of race, creed or socio-economic standing, decided that, as a part of their mission, they would issue an annual “Report Card” to measure the well-being of the city’s children, youth and families. The team working on the report card determined that they needed guidance in developing these progress reports.

The Casey Foundation and the Center for the Study of Social Policy responded to Philadelphia’s request for help by setting up a match with individuals from two jurisdictions (San Diego and Vermont) that had developed desired outcomes for children and families by using report cards. Working together, the team from the three sites successfully chose and organized indicators, packaged and communicated the data collected, and prepared a strategy for using the report card.

The Team

The six-member team from Philadelphia included the deputy director and another key staff person from Safe and Sound, members of the evaluation and data group, university representatives, and a media consultant. Each member of the Philadelphia team played an important role in the development and promotion of their report card. Nancy Bowen,

Chief of Children, Youth and Family Health Planning in San Diego County, and Con Hogan, former Secretary of the Vermont Agency for Human Services added their experiences to a wide-ranging discussion that was calculated to help the Philadelphia team develop some options for strengthening their efforts.

Technical Assistance Focus

Prior to the match, the Philadelphia team, in consultation with Nancy Bowen of San Diego, identified three broad areas of focus for the match.

1. Selecting indicators: what types of family indicators should be added to the current potential menu of child indicators? What process might be used for selecting indicators from the menu? How should partial data – or a lack of data – be handled?
2. Developing the Report Card: What key players should be involved? How to be prepared for both negative and positive reactions to the Report Card? Should the Report Card include grades? What are some of the various structures/formats used for report cards?
3. Launching the Report Card: What types of media and dissemination techniques are most effective? How can you prepare for community reactions and expectations?

A discussion of lessons learned was included in each of these broad topic areas.

Philadelphia's Context for the Match

Philadelphia's Report Card Project, part of the Philadelphia Coalition for Kids, is viewed as a critical component of the overall effort to improve the delivery of youth services. Several staff members (including the Executive Director) had already reviewed other models used around the country, and traveled to Kansas City to learn more about their use of data to improve results. The work was begun in the summer of 1999, and has united the efforts of several universities (Temple, St. Joseph's, and the University of Pennsylvania), government (the Mayor's Children's and Families' Cabinet, the Cabinet's Data Policy Group, and numerous city departments), the School District of Philadelphia, and some private agencies.

A great deal of work has been completed since the summer of 1999, and the Philadelphia team had unveiled its Report Card in a major media and citywide campaign during June 2000. There is, however, still have a significant amount of work to do, individually and with other stakeholders, to select final indicators, collect data, push forward a public awareness/media campaign, and disseminate the Report Card.

The Consultation

The consultation was short: a one-day meeting held at the Foundation. Although the Philadelphia team did not have a chance to meet informally with Con Hogan (Vermont) or Nancy Bowen (San Diego) prior to the match, they did have knowledge of the exceptional work done in both of these sites. Nancy and Marsha Zibalese-Crawford (who took the lead for the Philadelphia team) did have some opportunity to talk and learn more about each other's work prior to the match, during a pre-match conference call.

The peer consultation began with Philadelphia leading a short PowerPoint presentation on the indicator work they have done to date. Although a hard copy of the presentation had been circulated to some participants prior to the match, the PowerPoint presentation helped in clarifying both the indicator work and the thinking that has already been done.

Media consultant to the Philadelphia team, Frank Keel, also made a short presentation about the impressive work they have done since the first week of February 2000, to lay the ground work for the Philadelphia Coalition for Kids, and the Report Card component.

Issue Area One: Selecting indicators

Con Hogan opened the facilitated discussion with a very strong pitch for defining important outcome areas with "powerful, big statements." The current Philadelphia plan has segregated indicators into the following youth domains: early childhood, general childhood, teen years, teen safety, and school performance. He described the powerful effect that strong statements can have, mobilizing communities and giving people a common purpose. He encouraged the Philadelphia team to consider adopting this kind of framework and organizing indicators under developmental outcomes such as "children are born healthy," "children are ready for school," or "children are succeeding" as examples.

In response to a Philadelphia concern about "not sugar coating the indicators, but not being so fatalistic that everyone is discouraged," Con also talked about how these outcomes can be brought to life with the use of "stories" about the best and the worst of the outcomes and indicators.

Drawing on San Diego's efforts to assure their indicators were clear, sound, and easy to understand, Nancy Bowen was helpful in a discussion about making sure indicators and their data are consistent. For example, don't use an indicator that describes "immunizations for children under three years of age" if the data is actually reflective of "immunizations for two-year-olds." Nancy also cautioned about the careful use of wording (AIDS vs. HIV infections, narcotics vs. illegal drugs, or accidents vs. unintentional injuries). She described some of the effort and difficulties she and others in San Diego experienced when selecting indicators, terminology, and data for their report card.

Everyone agreed that selecting indicators is an evolutionary and imperfect process. “Best indicators” are difficult to determine: there are politics and various points-of-view that can make selection difficult at best. For instance:

- Data are often not available in the format, time period, or jurisdictional breakdown that is desired.
- Sometimes organizations and agencies are not willing to share their data, for fear of how it will be used or because of turf concerns.
- The choice of indicators is likely to change over time, as the community fine-tunes what they most care about, and how they believe it should be measured. Nancy and others suggested that it might be important to select a few “core” indicators that will be used in every annual report card.
- This consistency in a few carefully selected indicators will be helpful for the community to pay attention to some of the most important issues, while the rest of the Report Card can be fluid, changing to reflect people’s concerns.

All participants listed the following ideas and lessons learned about the selection of outcomes and indicators:

- Choose a limited number of indicators (about 20), using groups of indicators that are proxies for that particular outcome. Using too many indicators will require extensive resources to measure. If progress is being demonstrated in a few indicators, others will follow the same path. Choose just enough indicators to “paint a picture” of well being.
- Sort the indicators by developmental ages, tying them directly to strong outcomes.
- Choose some positive indicators that illustrate community assets, such as use of recreational facilities and libraries.
- Acknowledge that there will be some data gaps. When valid or accurate data are not available, build a data agenda on what is missing. Sometimes just showing the data gap in the report card itself will create attention around what’s missing, and cause enough momentum to find or develop the missing data.
- Look for outcomes that extend across different sectors or domains (ex: “children are healthy”), and use indicators that show the connectedness between education, health, safety, etc. Make sure that indicators are “bigger than programs” and then gather the stories about how individual programs are working to make a difference in the indicators.
- Show longer trends. Try to have five or ten years of data available in a trendline whenever possible. This gets across the message that making progress is a multi-year process, and makes weak data tell a stronger story. When data are not available for particular years, use what is available.

- Use data that extends beyond political terms of office, so that it is not used merely as a tool for political purposes. Building strong community constituencies for the outcomes and indicators, however, will hold any and all political regimes accountable for progress.
- Be sure to use simple, understandable outcomes and indicators to which the media can easily relate. Media is the key to public awareness, so make sure chosen language is easily understood – and easy to rally around – by all residents. Getting people interested in the data *depends on their understanding* of the data.
- Whenever possible, consider comparing indicators across jurisdictions (such as city to state, or state to entire country). It also can be very effective to compare a city’s indicators against itself over time.
- Add family indicators to the menu of child and youth indicators. It is easier to select family indicators, when outcomes that the entire family (ex: Children live in caring and supportive families) are part of the overall framework. Some ideas of family indicators include: rates of domestic violence use of homeless shelter beds, home ownership, educational levels achieved, and family income. The Search Institute has done some work around family indicators and assets that could be helpful, but collection of these data might require a survey.
- Consider showing ethnic and racial disparities for indicators when available or appropriate.

Issue Area Two: Development of the Report Card

The Philadelphia team has reviewed several different formats and structures used in various jurisdictions around the country. Through Nancy Bowen, they also had a chance to review the San Diego Report Card and passed around the recent Report Card issued by Santa Cruz County, California.

What works? Discussion ensued about the importance of the audience for the Report Card. People in neighborhoods and the general citizenry must find these documents interesting and engaging. Often, people do not feel much passion about data and can be intimidated by lots of numbers. It’s important to catch their attention with a Report Card that tells a story in understandable language, uses photos to capture the public imagination, and doesn’t bog down in too much detail.

Match participants also discussed the political fallout or “static” that can occur with a report card. The discussion centered around being prepared to find opportunities in both negative and positive responses to a Report Card. Although not a political process per se, agency administrators and politicians alike will be wary of the potential for being

“graded.” No one likes to be shown in a poor light, or be blamed for concerns or problems that may be raised in a report card.

An important facet of the discussion explored the pros and cons of grading progress. There are lots of ways to “grade.” Some jurisdictions use letters (A, B, C, D, E, and F), while others use icons such as thumbs up or down, or smiling and frowning faces. Although these have utility as a quick way of communicating progress, they can quickly become suspect. Who decides if progress rates an “A” or a “B” or a smiling or frowning face? What criteria can be used that won’t be seen as judgmental or arbitrary by some? Debates about the grades can distract from the more important point: is progress being made or not? Con Hogan suggested that, in his experience, using a trend line with five or ten years of data told the story better, and perhaps more accurately, than a grading system could. “Let the data speak for itself.” Others suggested that a happy medium could be either using some type of scoring for a few of the indicators or a modified grading system that indicates a direction of better, worse, or unchanged.

Participants talked about ways to take some of the suspense and pressure away from the report card. Everyone agreed that key stakeholders – including politicians and agency directors – would benefit from meetings prior to the public release of the Report Card so they would know what was included, and why. Con reiterated the important concept that *everyone* must accept accountability to improve outcomes, and *no one* should be blamed.

All of the match participants brainstormed some ideas about what components, format, and structure are important for a report card.

- Include interesting stories (sometimes in sidebars) about what is working – and what is not working -- upfront and throughout the document to catch people’s attention. Connect these stories to the data. Get a balance between stories that tell the good news, and stories that tell the worst news.
- Put the data upfront, in easily readable graphs and charts. For each indicator used, tell the reader why it is important in their community. Put the details in the back so readers won’t be bogged down with the “fine print.”
- Either develop an executive summary for people who won’t read a long report, or create a report card that is short and simple enough for people to look at the whole document.
- Use the Report Card to highlight some model strategies (not programs), or possibly use a later update to highlight these strategies. Some of the strategies should show how neighborhoods could get involved, and some should be no cost/low cost.
- For people who don’t like to look at numbers, be sure to use some visual or word-oriented representation of the numbers throughout the Report Card.

- Some people like to look at maps showing demographics, “hot spots,” and overlays of data.
- To get feedback or allow readers to request more information, insert a post card or self-mailer for easy use.
- Make some unbound copies of the Report Card available (assuming that is it a bound format) so pages can be pulled out or copied separately from the entire document.

Issue Area Three: Launching the Report Card

Report cards are often more than just a way to measure change. Report cards can be a catalyst for mobilizing entire communities around improving child and family well being. This won't happen, however, unless there is community knowledge of the report card and acceptance – credibility – of its contents.

The match participants were all clear in their understanding about the importance of how the Report Card is disseminated throughout Philadelphia, and how it is received.

Frank Keel made a strong case about “making the media your ally.” In Philadelphia they already have begun a media campaign, and it is quickly becoming very visible. Using a one-to-one match approach (“we'll buy one advertisement, you give us one for free”), they've doubled the amount of resources available for this use. They also are negotiating with their local ABC affiliate station to do a one-hour program, designing a major Children's Expo 2000 for November, and planning to celebrate local champions.

Together the participants discussed ideas about how to disseminate the Report Card – and be a catalyst for change and community follow-up -- to reach a wide and varied audience.

- Publish it in more than one language (such as English and Spanish) when appropriate.
- Insert a copy (or an executive summary) in local newspapers.
- Visit with editorial boards of the local media. Tell your story, but also be prepared to explain how *your* Report Card is different from the numerous other reports – and even report cards – that have been issued in the past few years. Talk about the cross-sector, cross-community nature of the Report Card, and discuss the desired outcomes – ones that the entire community can rally around.
- Market the Report Card in “20 different ways.” Hold community forums, visit neighborhood associations, hang posters showing trendlines and progress in lobbies of public buildings, send multiple copies to libraries.

- Encourage (through one-on-one visits) local businesses and employers to put a logo on their letterhead recognizing the effort, e.g., “A Proud Supporter of Philadelphia’s Campaign for Kids Report Card.”
- Encourage local media to do stories about the Report Card, and tie the stories to work in the community that is impacting the outcomes and indicators.
- Get community collaboratives to “take it on and own it.” Ask them to frame their work and efforts around the outcomes and indicators.
- Create a speakers bureau by training local supporters and members of coalitions to speak about the Report Card to community groups.
- Encourage local public and private agencies to build the question “What are you doing to impact these outcomes?” into their staff evaluations, and write subcontracts that reflect the need to impact the outcomes.

Wrap-up

During the closing session all of the participants were asked to reflect on the discussions and observations during their time together, and identify the most important things that they heard and learned. Since peer technical assistance is a results-oriented process, they were also asked to make commitments as to what they will do in the coming days and weeks to make use of what they learned in the match.

One of the peer consultants mentioned that she had learned some ideas about framing outcomes. She also talked about how *every* report card, including their own, must be refined every year. The peer consultants and all match participants said that they learn more every time they talk about outcomes, indicators, and report cards. One member of the Philadelphia team expressed feeling more confident that they are ready to move forward, and have lots of good ideas about how to get more people on board with the Report Card.

The peer consultants assured the Philadelphia team that they would continue to provide peer consultation as requested and remain in contact to help with next steps.

Key ideas and learnings that the Philadelphia team and all participants identified included:

- A common purpose – the desired outcomes – drives all of the work. Outcomes also will help define the most important indicators.
- It pays to be up front and honest about the best and worst of stories. Another important strategy is using “flashpoints,” i.e., arresting positive and negative indicators, to get attention for these issues.

- Each indicator doesn't have to be perfect, nor does every possible indicator need to be used, because a small collection of indicators can show progress.
- Five or ten years worth of data tells a much clearer, and less political picture, than three years worth of data.
- Investing in a media campaign is critical to getting the message out.
- Clarity, credibility, and accountability are all critical in a Report Card.
- The packaging of the Report Card is almost as important as the actual contents of the Report Card, because people won't respond to it if it doesn't catch their attention and make sense to them.

Members of the Philadelphia team made commitments about how they will use the information they gathered and the actions they will take as a result. Overall, they said they felt "very poised for making a difference." As a team, they plan to:

- re-think the nomenclature of the domains they've chosen, in order to look for more powerful ways to communicate the desired outcomes;
- revise the list of potential indicators based on some of the suggestions as well as the need to add some family indicators;
- re-think the decision to include examples of best practice programs in this first version of their Report Card;
- use more appendices in the back, and less detail in the front, of the Report Card; and
- revise the draft interim indicators report before it is presented to key stakeholders next week.

LIST OF PARTICIPANTS

Philadelphia Team

Naomi Post Street, Executive Director
Philadelphia Safe and Sound
2532-34 North Broad Street
Philadelphia, PA 19132
215 226-2501, 215 226-2518 (Fax)
nmpost@philasafesound.org

Denise Clayton, Deputy Director
Philadelphia Safe and Sound
2532-34 North Broad Street
Philadelphia, PA 19132
215 226-2501, 215 226-2518 (Fax)
dclayton@philasafesound.org

Frank J. Keel, President
Keel Communications
525 Richters Ferry Road
Bala Cynwyd, PA 19004
610 668-1718, 610 668-9257 (Fax)

Mathew McClain, MPH
Public Health Policy & Planning
413 Schuyler Road
Silver Spring, Maryland 20910
301 585-7785, 301 585-7784 (Fax)
AIDSPOLICY@aol.com

Tony Nazzario, MIS Coordinator
Philadelphia Safe and Sound
2532-34 North Broad Street
Philadelphia, PA 19132
215 226-2501, 215 226-2518 (Fax)
anazzario@philasafesound.org

George W. Dowdall, Ph.D., Professor of
Sociology St. Joseph's University (on
leave, 1999-2000) currently is
Congressional Fellow
Office of Senator Joseph R. Biden
221 Russell Senate Office Building
Washington, D.C. 20510
202 224 0131, 202 224 0562 (Fax)
George_Dowdall@biden.senate.gov

Neil A. Weiner, PhD, Senior Research
Associate
Center for Study of Youth Policy
University of Pennsylvania
4200 Pine Street, 3rd Floor
Philadelphia, PA 19104-4090
215 898 2091, 215 573 2791 (fax)
neilw@ssw.upenn.edu

Marsha Zibalese-Crawford, Associate
Professor
Temple University, School of Social
Administration
Ritter Annex, 5th Floor
Philadelphia, PA 19122
215 204 3760, 215 204 0554 (fax)
mcrawfor@unix.temple.edu

Vermont

Con Hogan, former Secretary of the
Agency for Human Services
Senior Consultant, ACEF
(802) 479.2723, fax is same number
ConH@aecf.org, Chogan@bypass.com

List of Participants
Page 2

San Diego

Nancy Bowen, MD, MPH
Chief of Children, Youth, and Family
Health Planning
Health and Human Service Agency for
County of San Diego
PO Box 85222
P511F
San Diego, CA 92186-5222
(619) 692.8809
E-mail: Nbowenhe@co.san-diego.ca.us

Staff and Consultants

Lizbeth Leeson, facilitator, consultant to
AECF
Phyllis Brunson, Center for the Study of
Social Policy
Bob Giloth, AECF
Tom Kelly, AECF
Bill Shepardson, Center for the Study of
Social Policy