



# Demonstrating Impact: Tracking Clients' Progress Toward Economic Security

Webinar

March 27, 2013

1:00-2:30 p.m. PST

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CENTER FOR COMMUNITY  
ECONOMIC DEVELOPMENT



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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.

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*Greater client progress toward economic security*



**Paul Downey**  
President/CEO  
*Senior Community Centers*



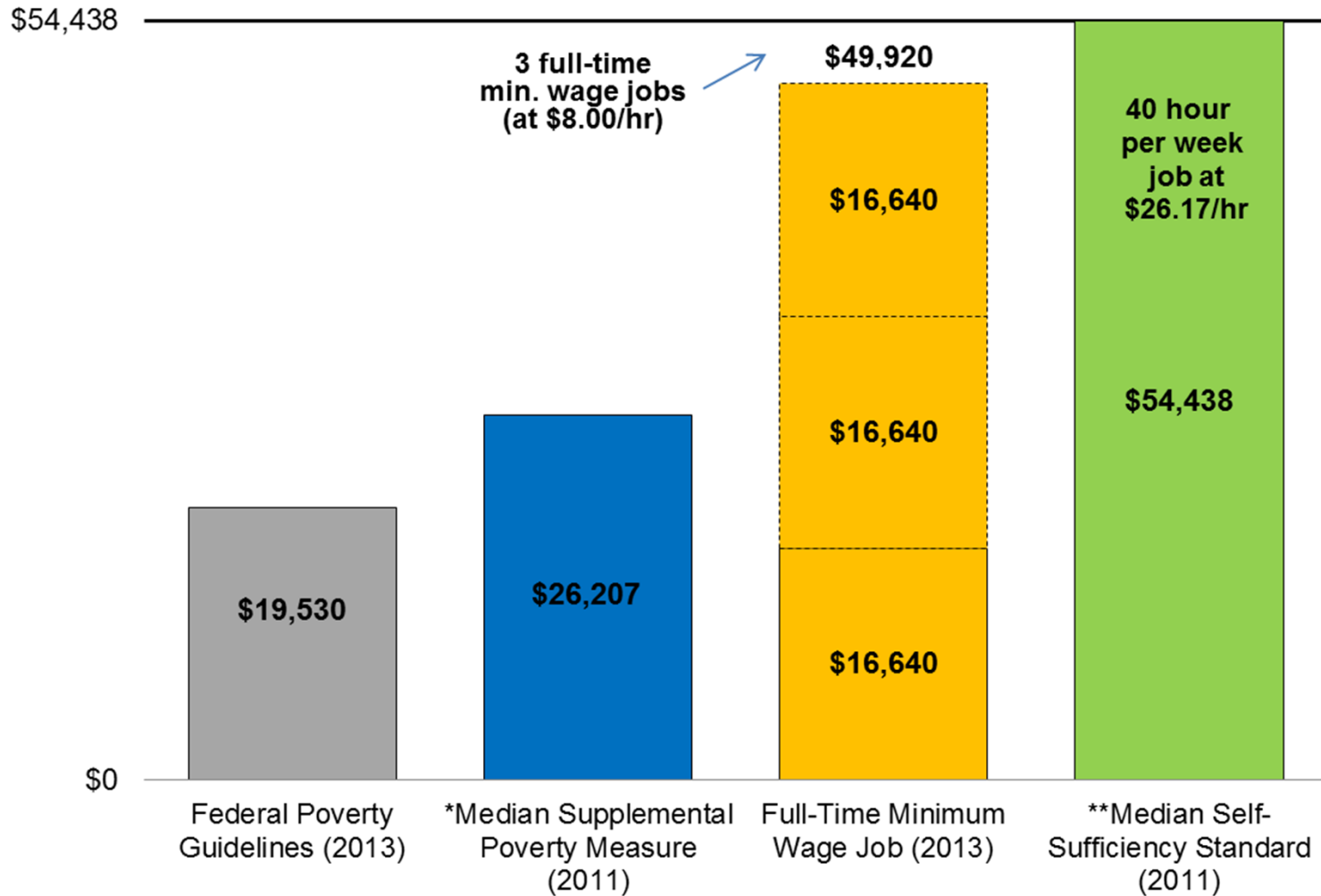
**Aimee Durfee**  
Senior Program Officer  
*Y & H Soda Foundation*



**Elizabeth de Renzy**  
Research and Public Policy Manager  
*Women's Initiative for Self Employment*

# California Economic Metrics Comparisons

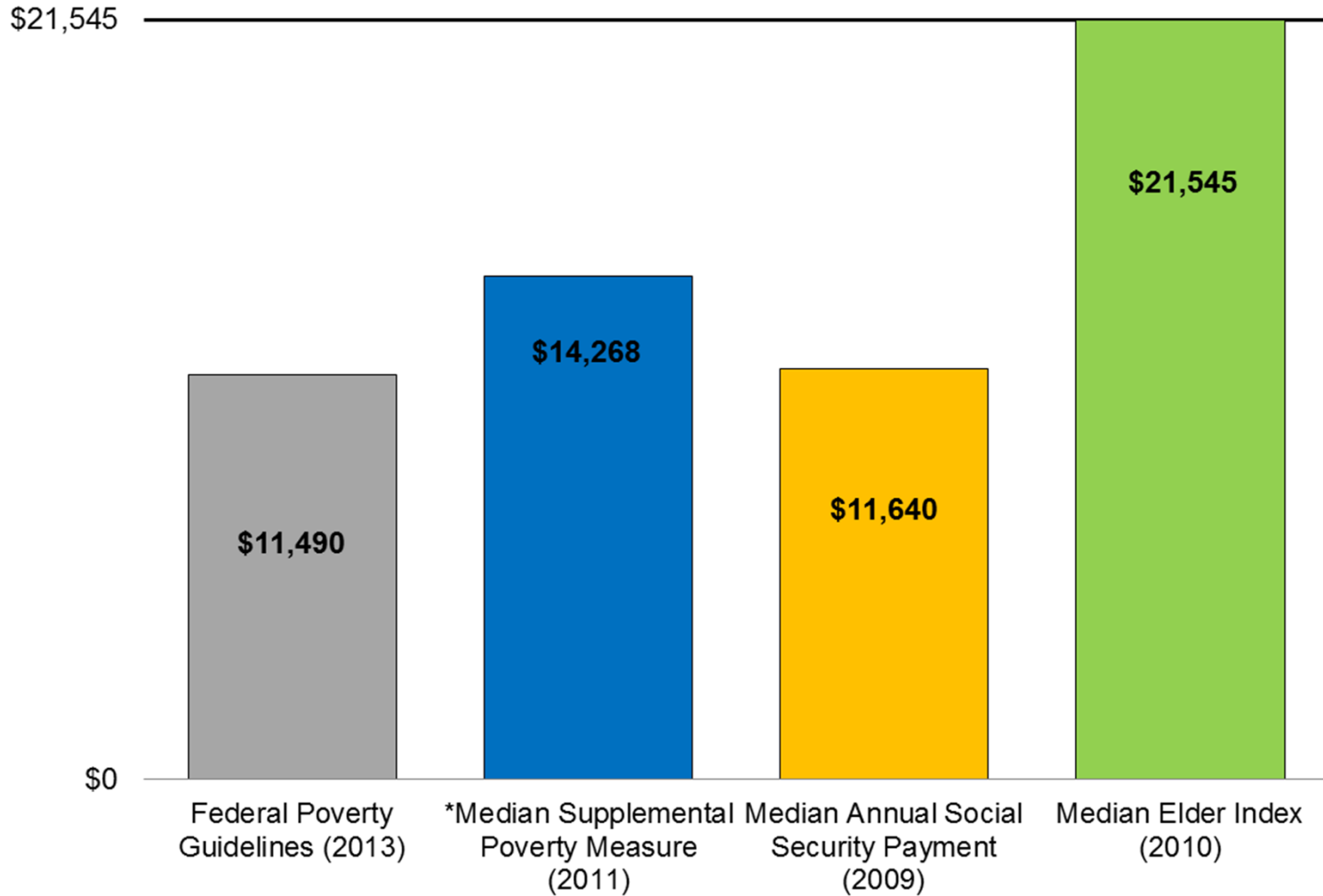
(3-person non-elderly family)



(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)



(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)

Monthly Expenses	Alameda County		Tulare County	
	One Adult	One Adult, Preschooler, School-age Child	One Adult	One Adult, Preschooler, School-age Child
Housing	\$1,153	\$1,366	\$605	\$703
Child Care	\$0	\$1,617	\$0	\$1,304
Food	\$276	\$628	\$236	\$538
Transportation	\$133	\$133	\$267	\$274
Health Care	\$140	\$395	\$141	\$398
Miscellaneous @ 10%	\$170	\$414	\$125	\$322
Taxes minus Credits	\$416	\$752	\$228	\$331
<b>Family Standard Per Hour (per adult)</b>	<b>\$13.00</b>	<b>\$30.15</b>	<b>\$9.10</b>	<b>\$19.30</b>
<b>Family Standard Per Year</b>	<b>\$27,456</b>	<b>\$63,674</b>	<b>\$19,228</b>	<b>\$49,757</b>

# Elder Index (2010)

Monthly Expenses	San Diego County		Humboldt County	
	Owner w/o Mortgage	Renter, One Bedroom	Owner w/o Mortgage	Renter, One Bedroom
Housing	\$424	\$1,112	\$332	\$657
Food	\$245	\$245	\$242	\$242
Transportation	\$214	\$214	\$214	\$214
Health Care = Good	\$182	\$182	\$390	\$390
Miscellaneous @ 20%	\$213	\$213	\$236	\$236
<b>Elder Standard Index Per Month</b>	<b>\$1,278</b>	<b>\$1,965</b>	<b>\$1,413</b>	<b>\$1,738</b>
<b>Elder Standard Index Per Year</b>	<b>\$15,337</b>	<b>\$23,586</b>	<b>\$16,957</b>	<b>\$20,857</b>





[www.servingseniors.org](http://www.servingseniors.org)



## **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



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

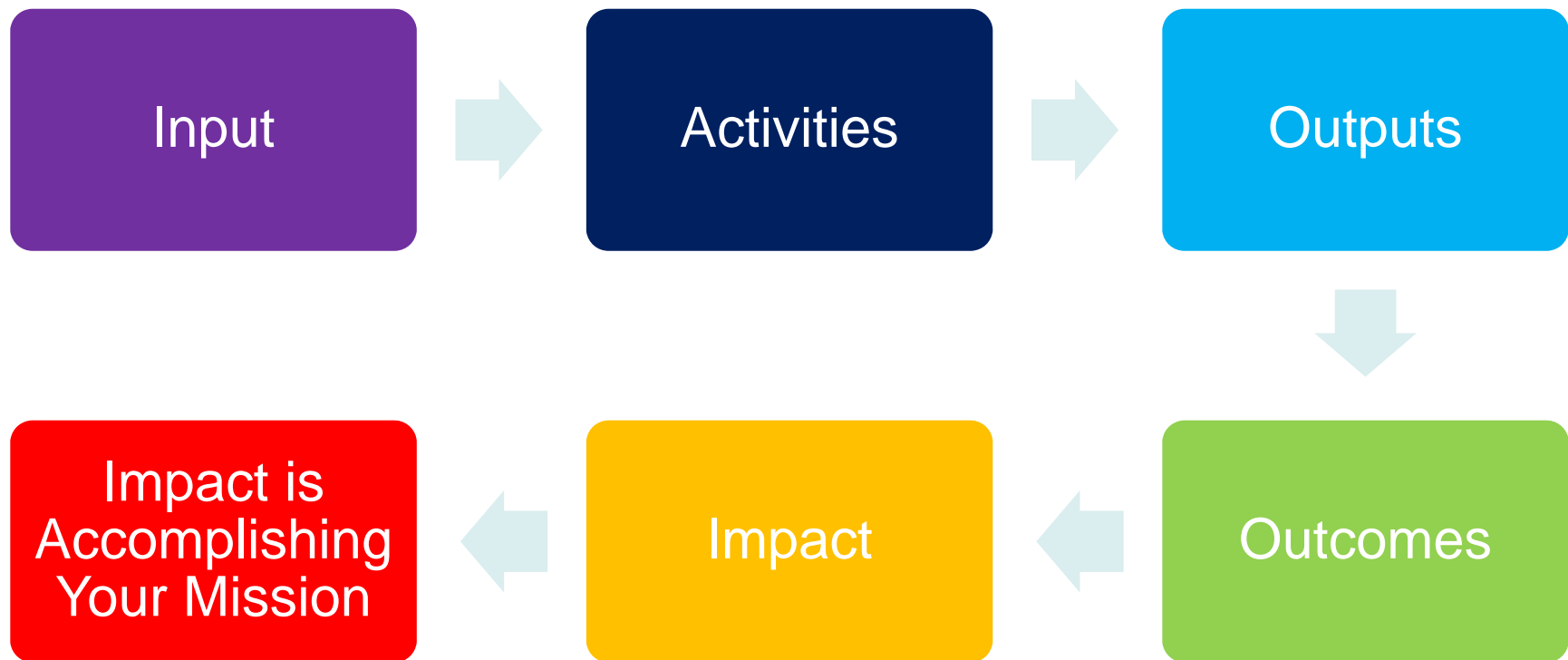
Senior advocacy and empowerment is at the core of all Gary and Mary West Wellness Center Services. Staff and leadership advocate for seniors at the city, state and national levels. Knowledge from the Center is used to guide policies that support care for vulnerable seniors.



## **Demographic Snapshot:**

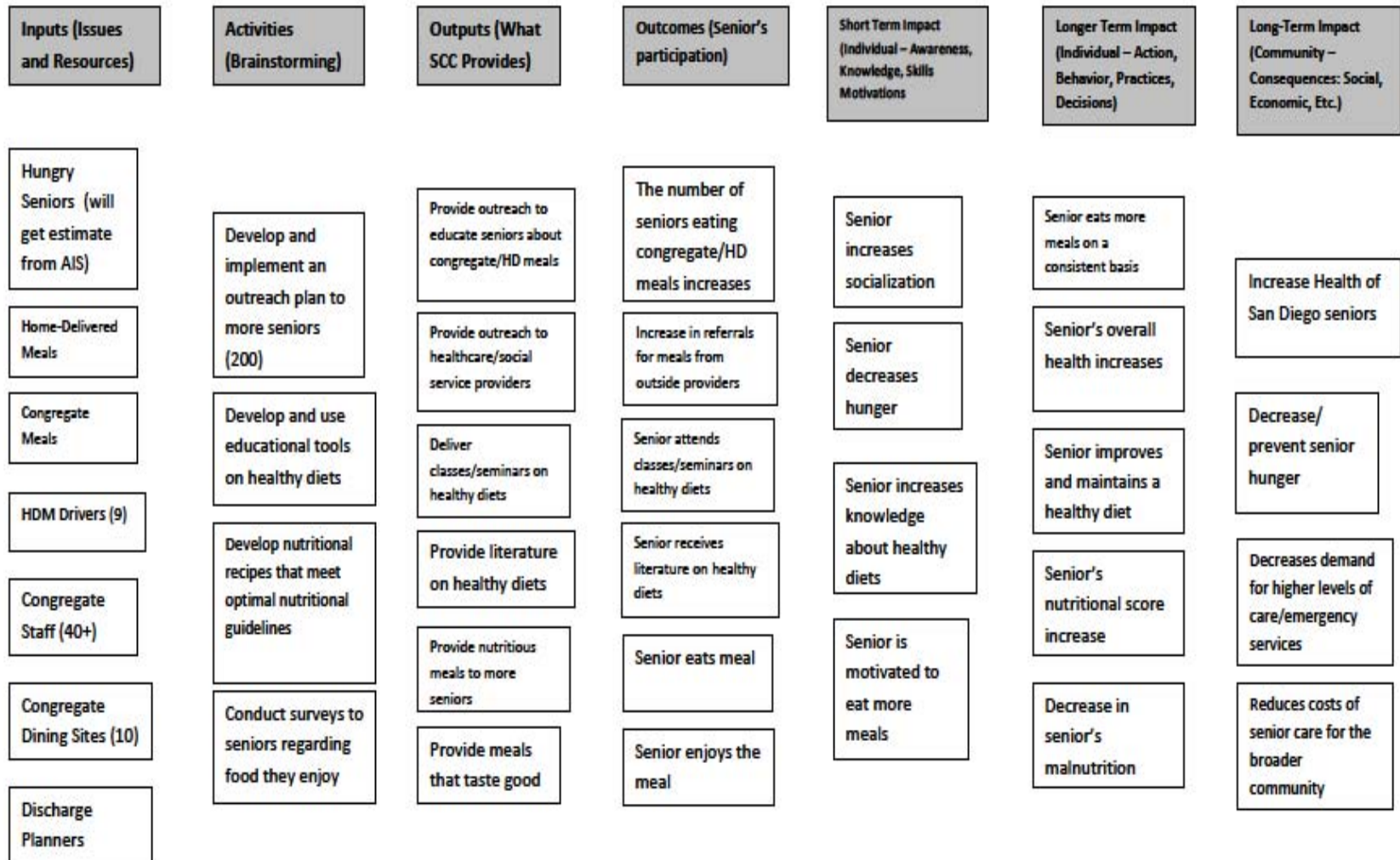
- Over 3,000 seniors per day through our facilities
- 75% at or below the FPL
- Remaining 25% fall into the Elder Index “gap”
- Mostly urban seniors living in SRO’s
  - Rents account for 70-80% of monthly income
  - Limited or no family Support
- Over 50% of seniors are ethnic minorities
  - Latino --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

# Logic Model





### Logic Model – Nutrition Program





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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**619.487-0650**

# 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



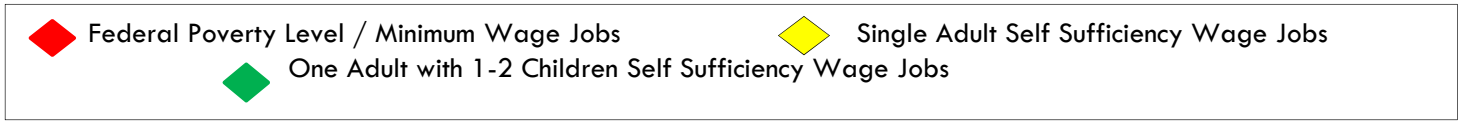
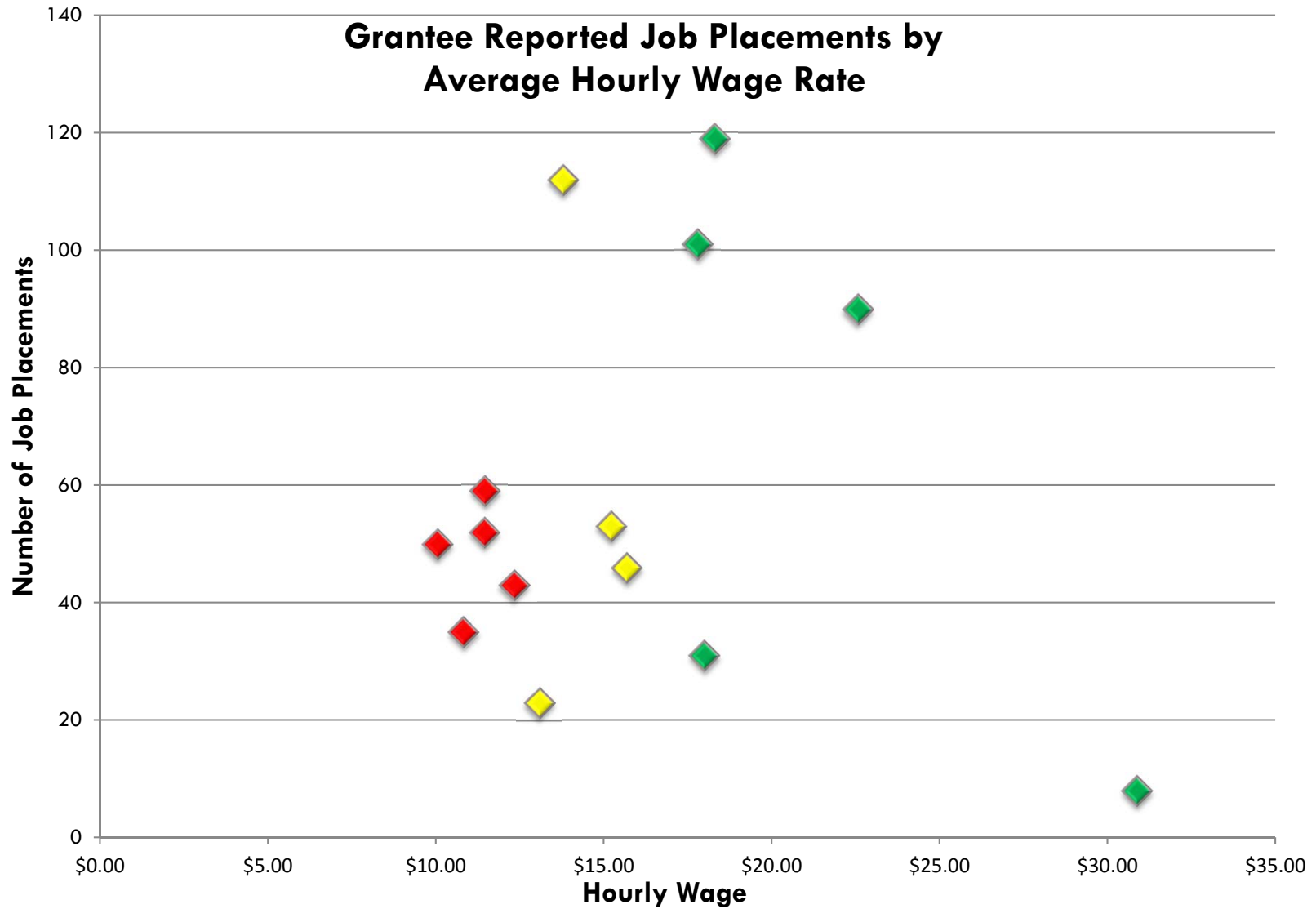
- Self-Sufficiency Standard (SSS) for **single adult** in Alameda/Contra Costa:
  - ▣ 2011: \$13.00 - \$13.39 per hour
  
- SSS for **single adult with 1-2 children**:
  - ▣ 2011: \$17.42 - \$36.52 per hour

# 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



# 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?

# What We Are Doing



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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# **WOMEN'S INITIATIVE**

## **Measuring Impact**

**Women's Initiative for Self Employment**  
**[www.womensinitiative.org](http://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														
		YTD	YTD	Yearly	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Programmatic		Goal	Actual	Goal												
<b>Women served</b>																
<b>MBAP/MPA attendance</b>																
<b>Simple Steps/Paso a Paso enrollment</b>																
<i>Simple Steps</i>																
<i>Paso a Paso</i>																
<b>Simple Steps/Paso a Paso graduation rate</b>																
<i>Simple Steps</i>																
<i>Paso a Paso</i>																
<b>SuccessLink/AVANCE enrollment rate</b>																
<i>SuccessLink</i>																
<i>AVANCE</i>																
<b>SuccessLink/AVANCE renewal rate</b>																
<i>SuccessLink</i>																
<i>AVANCE</i>																
<b>SuccessLink/AVANCE average monthly utilization</b>																
<i>SuccessLink</i>																
<i>AVANCE</i>																
<b>Loans</b>																
<b>Net promoter Score</b>																

**Legend**

- = Celebrate! 100% of goal achieved
- = Monitor. 80-99% of goal achieved
- = 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



# 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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