RACIAL EQUITY 6 TOOL

EVALUATION AND LEARNING

SP 103 – Data
In this video, we cover SparkPoint data including outcomes, data collection forms, our data tracking system, reporting, and bundling.

Goals for this section:
- Review SparkPoint performance metrics
- Create your program goals for Years 1 & 2 or for the program pilot through a logic model
- Determine what system you will use to track metrics
- Determine how you will evaluate the program

SPARKPOINT METRICS

As you set goals and objectives in support of your vision for a successful SparkPoint center, you should consider how you will collect and analyze information to measure these goals and objectives. More specifically, there should be a clear objective tied to every planned strategy or activity, and each objective should have a clearly defined goal for which you can measure whether you are successful or not in reaching your objective. Don't forget to make sure that these clearly defined goals of your SparkPoint center need to be in alignment with your institutional strategic plan. It is important for SparkPoint centers to measure outputs that assess the quality of program implementation, outcomes that measure program impact, and demographic data that demonstrate who is being served.

Measuring Program Implementation
SparkPoint can be adapted to the needs of your local student and community population. Thinking about your planned strategies and activities, what are the short- and long-term program implementation goals that you hope to achieve? What data will help you know whether your program is being implemented as planned?

SparkPoint centers at postsecondary institutions can track metrics that are specific for their local student population. Below are examples of output metrics in the postsecondary setting:
- Total number of students served
- Total number of student parents served
- Total number of partnerships established to promote integrated services
- Total number of practices and policies implemented to support diversity, equity, and inclusion for SparkPoint center activities
- Total number of students accessing financial assistance
- Total number of students accessing financial aid

Below are core program output metrics that United Way Bay Area uses to track program implementation across the SparkPoint network:
- Total number of individuals served
  - Total participants served (participants are individuals that engage in light touch services without completing assessment, such as food pantry or one-time visit)
  - Total clients served (clients are individuals that engage in high-touch services with ongoing service appointments and completed assessments, such as financial coaching)
    - Total number of newly enrolled clients
    - Total number of ongoing clients
    - Total number of clients exited from program
- Total number of services provided (by service category)
- Percentage of clients re-assessed (so client outcomes can be measured)

SparkPoint centers can disaggregate output metrics by demographic factors, such as race and gender, to determine whether the program is reaching the communities with the greatest needs. Refer back to your target population description and utilize program data to determine whether your program is serving the people you are intending to serve.

Measuring Program Impact

Tracking program outcomes is important for understanding your program's impact on students' lives. The core outcome metrics of SparkPoint is focused on clients' improvement on their credit (e.g., credit score), income, debt, and savings. SparkPoint uses a pre and post- assessment approach where program impact is determined by examining whether a clients' financial status improved after engaging with the program for some time. Typically, assessments are completed at intake (e.g. baseline assessment) and every three to six months (e.g. interim assessments). By comparing clients' financial status over time, we can understand a client's economic situation and how it has or has not improved due to their participation in the SparkPoint center.

Based on *The SparkPoint Difference* report, at every college where we were able to obtain data, we observed that persistence rates among students enrolled in SparkPoint were higher than the college-wide average. SparkPoint centers at postsecondary institutions can track metrics that are specific to their local student population. Below are examples of outcome metrics in the postsecondary setting:

- Percent of student clients with improved persistence rates
- Percent of student clients with improved retention rates
- Percent of student clients with successful completion of education or training program

United Way Bay Area's core outcome metrics utilize the success framework below, modeled after the Arizona Self-Sufficiency Matrix, to track a client's journey toward financial empowerment.

SPARKPOINT SUCCESS FRAMEWORK

(Note: SSI = Self Sufficient Income)

	IN CRISIS	VULNERABLE	STABILITY	SUCCESS (OR BUILDING CAPACITY)	PROSPERITY (OR EMPOWERED)
INCOME	No income	Has income that is less than 75% SSI	At least 75% SSI	At least 85% SSI	At least 100% SSI
SAVINGS	No Savings	2 weeks of savings	1 month savings	2-3 months savings	3+ months saving
CREDIT	Has very poor credit (<500)	Has poor credit score (500-599) or no credit history	Has fair credit score (600-649)	Has good credit score (650-699)	Has good credit score (700+)
DEBT	Has outstanding debt collections, regardless of DTI.	Has very high debt-to-income ratio (50+%).	Has high debt-to-income ratio (36-49%).	Has manageable debt-to-income ratio (35% or less) with revolving debt.	Has manageable debt-to-income ratio (35% or less) and no revolving debt.

In addition, United Way Bay Area measures the following outcome metrics:

- Percent of clients who reach their own financial goal
- Percent of clients who enroll in or maintain public benefits
- Percent of clients who improve their financial status (income, savings, credit, or debt)
- Percent of clients who reach an improved financial status stage (income, savings, credit, or debt) within the

success framework
- Total number of clients who obtain employment or enroll in education or training program
- Total number of clients who improve housing situation
- Percentage of individuals who reported meaningful impact from SparkPoint in the Client Satisfaction Survey

Beyond these metrics, SparkPoint centers may vary by site due to the unique set of services and goals at each center. Furthermore, outcomes metrics can be disaggregated by demographic factors, such as race and gender, to determine whether the program is having equitable impact.

Demographic Data

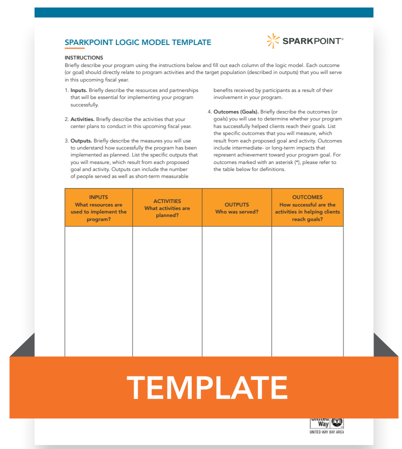
Demographic data is crucial for ensuring that your SparkPoint center is serving the target population and providing equitable impact. It is important to collect demographic characteristics of your program participants (e.g., age, gender, race, ethnicity, household income, education level, zip code of residency, employment status, etc.) to understand who is being served. This allows you to disaggregate program metrics so you can assess differences in how certain populations experience and benefit from the program. Understanding your clients' demographic and socioeconomic status can inform tailored coaching strategies as well as help program leaders understand the population accessing their SparkPoint services. A good guiding rule for determining what demographic characteristics to collect is considering whether the demographic characteristics influence a student's outcomes in any way. Because race is a primary identifier of economic inequality based on historical and present systemic racism, capturing, and analyzing racial demographic information needs to be a core element of your evaluation and learning process.

LOGIC MODEL

A SparkPoint center's logic model graphically represents your program's overall strategy and intended impacts. A logic model shows the relationships between resources and partnerships needed to make the program successful (i.e. Inputs), program activities (i.e. Activities), milestones to track whether the program is being implemented as planned (i.e. Outputs), and the intended outcomes and impact of your program (i.e. Outcomes).

The logic model can be a powerful tool to communicate your program activities and goals to your team and key stakeholders. It can also be useful for facilitating conversations and decisions regarding prioritization or de-prioritization of specific resources, activities, and goals. As your SparkPoint center evolves, the Logic Model can serve as a living document that can be updated to reflect changes to your program activities and intended impacts.

Use the logic model template to set your goals.



DATA COLLECTION CONSIDERATIONS

SparkPoint centers typically utilize a case management database that stores client data to support case management and program evaluation activities at SparkPoint. For example, United Way Bay Area uses a database called Exponent Case Management (ECM), a Salesforce-based application, to collect and track client data as well as program administration information.

Successful program evaluation and learning will require dedicated staff time for tracking data, as well as a database platform to house all the data securely. A successful case management database platform would have the following characteristics:
- all client and service delivery data captured in one place
- securely stores and safeguards client information
- supports integrated service delivery and joint case management
- allows program managers to view overall program performance data and manage caseloads
- provides real-time insights to support continuous program improvement

EVALUATION PLANNING RESOURCES

Evaluation and Learning at SparkPoint consists of the regular collection of information about the activities, characteristics, and outcomes of SparkPoint programs. This information is used to make judgments about the programs, improve program effectiveness, and inform decisions about future program development. (https://www.cdc.gov/eval/guide/introduction/index.htm). To delve deeper into a more formalized process of evaluation planning, please utilize this resource https://www.cdc.gov/obesity/downloads/CDC-Evaluation-Workbook-508.pdf. to guide you as you plan out your evaluation and define your evaluation scope, stakeholder inclusion, communication planning, and evaluation questions.