Refining our work through measurement
*Index of Impact© creates accountability*

The Index of Impact© is a dynamic compilation of the measures we use to monitor progress in our Agenda for Change, and the indicators by which we focus and determine direction of our investments.

In 2001, as United Way of Dane County began its transformation to an impact business model, the guidance from the Committee on Focusing Resources included a recommendation to measure our work on the visions we created. Our six Community Solutions Teams (CSTs) began work on our vision and the Agenda for Change was approved by the board in 2003. The CSTs continued to focus their visions and priorities and shift funding over two cycles as they gained competence in their subject areas, learned about best evidence or promising practices (as they may exist), and began to examine community indicators.

In June 2005 the board approved a set of measures developed to gage progress in our priority areas; we named these the Index of Impact. In June of 2007 our board reaffirmed the Index of Impact, recommending we continue to refine our measures as new data and data sources become available.

**Benefit: greater focus and prioritization**

Choosing and refining indicators creates much healthy discussion by our volunteers as it necessarily forces greater focus and prioritization. A benefit of our Index of Impact is closer collective understanding of what we’re trying to achieve in each of the Agenda items. We learned the value of having one indicator in the education Agenda area when we used the 3rd grade reading level chart to focus our efforts with the Madison Metropolitan School District over 11 years.

Measuring change informs our work and helps us determine the practices that create the most success. --Doug Reuhl, CEO, American TV

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**Wisconsin Reading Comprehension Test 1991-2005**

Below Standard/Minimal Performance by Ethnic Group

A single easy-to-understand measure helped focus the community on an important educational issue.

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In the past two years, the Index of Impact has been used to:

- Focus and create momentum for community change
- Organize our behavior
- Measure the community’s work and progress on the Agenda for Change as a community report card
- Create alignment and accountability with our agencies’ and partners
- Communicate our success
- Illustrate and educate the public on our community’s issues, building our reputation as a spokesperson for the human condition in Dane County
- Make investment decisions

Some sources changed their definitions and consequently their reports when we called attention to the indicator or for separate political reasons. In some cases there are conflicting sources of data that make evaluation of our community a challenge. In other cases we created systems of data collection, relying on our agencies to provide accurate and regular numbers.

Our criteria for selecting our indicators include:

- Measures an element of success of the community’s work on our Agenda for Change
- Identifies and documents best evidence, promising practices, and best practices
- Offers attainable, accurate, and regularly produced data (annually or more frequently)
- Describes the community’s results at-scale
- Enables agencies to align their program outcomes to our indicators
- Translates easily to multiple audiences, including the general public and the donor

How we develop our metrics

We search continuously for local data and measures. Most of our data comes from Dane County, the State of Wisconsin, and Federal government sources. We use over 40 sources of data to create graphs for 44 indicators.

While we seek to maintain the integrity of our baselines and progress, this becomes complex as many of our sources refine the data and their reporting processes. Since we established our Index of Impact, we’ve encountered data that was established by government to measure the effectiveness of specific programs and is not collected regularly. We’ve also encountered data that significantly lags its reporting time frame and data that is not easily available unless specially requested.

Community engagement in choosing our indicators

In 2005, prior to board approval, we engaged the community in choosing our indicators with a variety of audiences, to explain our intentions: indicator design, and seek their feedback:

- Wisconsin State Journal reporters and editorial staff
- The Madison Times publisher
- Selected agencies’ staffs
- Agency executives
- The Business Volunteer Network
- Leadership Greater Madison
- Selected graduate-level classes at the University of Wisconsin in the School of Social Work
- The Lafollette Institute
- The Department of Human Ecology
- Trustees of our Foundation
Creating alignment

We have used our Index of Impact to create greater alignment with programs. Our data base automates the collection of data from the agencies. Each agency must report its program outcomes under the one specific indicator (Tier 1 or 2) it chose to influence. CSTs then monitor the alignment and value of agency outcomes against the chosen indicators, and make investment decisions appropriately.

In its June 2007 meeting, board members discussed the merits of having a community-wide indicator to provide a check and balance against the program outcomes provided by agencies. Board members advised us to continue to seek data as it becomes available for inclusion in our Index.

New: Scope and Dimension Indicators

We are frequently asked to describe the scope and dimension of the community’s issues. While some of our indicators are ideal at describing the scale of our problems or the size of the population affected, most indicators are necessarily constructed to measure change. We now include an additional group of Scope and Dimension Indicators.

Examples include
- Our measurement of Dane County’s children—by location, public/private school registration, age-block and numbers in poverty
- Number of children tutored in Schools of Hope
- Dane County median income
- Our partner agencies and their board members

We offer this information to help the community understand population sizes, demographics, and density issues. These do not measure change, but illuminate broad impact of the issues we’ve chosen to challenge.

Architecture for the Index of Impact

The Index of Impact has three tiers. The first is the 7 Agenda for Change indicators that measure specific work on each of the 7 Agenda items. We have specifically chosen to limit the number of indicators we are highlighting on the first tier to create attention on a critical few.

The second tier includes the vision-based indicators. Each of the CSTs monitor the progress on a handful of other measures that are important to the team’s visions. They are antecedents to the success of the Agenda indicator.

The third tier includes all the outcomes reported to us by the agency programs. Agencies submit their proposed outcomes (2 per program maximum) with their proposals. At year-end, they report their success on these outcomes and include a narrative on their program’s model, research, and results.
Example of Tier 1 indicator--measuring change in algebra completion rates.

Example of Tier 1 indicator with two sources—comparing children served in shelter (CDBG annual report) to number of children attending school (MMSD).

Example of Scope and Dimension Indicator—we are not trying to change the number of students eligible for Free or Reduced Lunch, but indicator does give us understanding of what Dane County school districts are experiencing.

Example of Tier 2 indicator—surplus food distributed—Strategy: Increasing the supply of surplus food allows families to spend limited resources on housing.