One day–all young people in tough neighborhoods will achieve the aspiration their families have for them: to graduate prepared for adult success and well-being in the worlds of work, family, and citizenship.

A Road to Results

A Performance Measurement Guidebook for the Annie E. Casey Foundation's Education Program

2007

AUTHORS:

Bruno V. Manno, Senior Associate, the Annie E. Casey Foundation, with assistance from Sarah Crittenden, Matt Arkin, and Bryan C. Hassel, Public Impact, www.publicimpact.com.

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The Annie E. Casey Foundation is a private charitable organization dedicated to helping build better futures for disadvantaged children in the United States. It was established in 1948 by Jim Casey, one of the founders of UPS, and his siblings, who named the Foundation in honor of their mother. The primary mission of the Foundation is to foster public policies, human-service reforms, and community supports that more effectively meet the needs of today's vulnerable children and families. In pursuit of this goal, the Foundation makes grants that help states, cities, and neighborhoods fashion more innovative, cost-effective responses to these needs. For more information, visit the Foundation's website at www.aecf.org.

TABLE OF CONTENTS

2 Introduction

3 Part 1: Understanding Performance Measurement

8 Part 2: Selecting Performance Measures

20 Part 3: Setting Performance Goals

22 Part 4: Reporting Performance Results

32 Conclusion

33 Helpful References

35 Appendix A: Performance Measures Worksheet

37 Appendix B: Leverage

38 Appendix C: Grantee Feedback Form

39 Endnotes

INTRODUCTION

The Annie E. Casey Foundation is committed to achieving results with its investments and reporting those results widely. Toward that end, the Foundation has developed a performance measurement process. This guidebook is designed to help its education grantees—and others interested in this topic—through the process of choosing performance measures and reporting results. Grantees will receive an Excel template for reporting on performance measures.

The guidebook is divided into four parts:

- *Understanding performance measurement:* a way of using data to ensure that a program achieves its goals.
- *Selecting performance measures:* guidelines for creating a group of measures that provide an accurate picture of your program's performance.
- *Setting performance goals:* guidelines for creating goals to allow your program to measure whether or not it is meeting its objectives.
- *Reporting performance results:* a detailed explanation of how to report your results to Casey's education program.

There are two other Casey publications available that provide a more general context for understanding the Foundation's education strategy and its results orientation:

- *A Road to Results: Results-Based Accountability in the Annie E. Casey Foundation's Education Program* www.aecf.org
- *A Road to Results 2006: Investing Resources to Achieve Results* www.aecf.org

We are grateful to the Foundation's education grantees who worked with us to pilot this approach in various stages over the past four years. We will continue to test and refine this performance reporting system, especially the Excel template that grantees will receive. We hope you—whether a grantee, a Foundation investment partner, or someone interested in this issue and approach—will find this publication useful. We welcome your comments and have included in Appendix C a Feedback Form for your use.

Bruno V. Manno

Senior Associate for Education

The vision that drives the Annie E. Casey Foundation's education program is that:

One day—all young people in tough neighborhoods will achieve the aspiration their families have for them: to graduate prepared for adult success and well-being in the worlds of work, family, and citizenship.

To achieve this vision, the Foundation focuses its education investments on overcoming three major barriers that stand in the way of greater quality and equity in the nation's K-12 education system:

- *Lack of preparation and quality educational options:* Many young people are not prepared to succeed in school and lack quality options to help them prepare for school as well as quality options when they enter school.
- *Lack of connections:* Families and young people in tough neighborhoods lack strong connections with schools and community supports and services that may help them succeed in school.
- *Lack of information and public will:* Policymakers, civic leaders, families, and the public lack both good information about effective education and the political will to be effective advocates on behalf of their own children and an improved K-12 education.

The education program invests in two program areas that it believes hold special promise for overcoming these barriers and for making a lasting contribution to achieving the education vision to which it aspires:

- *Creating quality educational options:* These options give families and young people more choices of effective schools that produce great results and prepare young people for adult success.
- *Building robust and effective networks and partnerships with community organizations:* These networks and partnerships have the potential to provide supports and services to families and children so that young people can succeed in school and be prepared for adult success.

To build high-quality programs in these areas, the education program's theory of change emphasizes the importance of creating systems that encourage high performance through the alignment of three essential elements: **incentives to perform, capacity to perform**, and **autonomy to perform**. These three elements together create the conditions in which quality educational options and robust neighborhood-based supports and services can flourish. These in turn make it possible for families, communities, and schools to thrive.[1]

In order to ensure the effectiveness of its programs, the Casey Foundation is committed to enhancing its understanding of how well its investments are working and what results they are producing. To meet this goal, the Foundation uses performance measures to track results consistently at the grantee, program, and Foundation levels and to align more closely the Foundation's work and the work of its grantees and partners around priority outcomes for children and families.[2]

One day—all young people in tough neighborhoods will achieve the aspiration their families have for them: to graduate prepared for adult success and well-being in the worlds of work, family, and citizenship.

In order to understand the following discussion of performance measurement, it will help if you are familiar with a few terms and how they are used in this guidebook.

PERFORMANCE MEASURES are measures of how well a grant portfolio, initiative, agency, organization, individual program, or unit/department is working. Rather than measuring whole populations, as do population-level indicators, performance measures quantify the quality and effect of specific grants, activities, or programs.

PERFORMANCE GOALS are desired levels of results on specific performance measures within a set time frame.

FIGURE 1

Performance Measurement Matrix

FOUR TYPES OF PERFORMANCE MEASURES
(with examples)

QUANTITY **WHAT WE DO**		QUALITY **HOW WELL WE DO IT**
# Customers served # of children served by school/district/other organization	effort	**% Customers served well** % of families satisfied with their schools
# Activities # of workshops presented		**% Activities performed well** % of activities receiving high ratings in structured peer reviews

EFFECTIVENESS

# WITH IMPROVEMENT IN:		**% WITH IMPROVEMENT IN:**
SKILLS # of students meeting targets for annual progress		**SKILLS** % of students meeting high targets for proficiency in reading and math
ATTITUDE # of families reporting they feel equipped to participate in school decision-making	effect	**ATTITUDE** % of families reporting they feel equipped to participate in school decision-making
BEHAVIOR # of students pursuing post-secondary education		**BEHAVIOR** % of students successfully pursuing post-secondary education
CIRCUMSTANCE # of new schools approved/opened		**CIRCUMSTANCE** % of families with access to multiple quality school choices

IMPACT indicates improvements in the success and well-being of children, families, or communities directly served by a grantee.

INFLUENCE indicates changes in policies, systems, practices, and/or opinions as a result of a grantee's work.

LEVERAGE is new or increased investment (public or private) in initiatives, programs, or areas in strategies that will lead to better results for children and families.

In developing its performance measurement approach, Casey draws heavily on existing approaches to performance measurement, with the work of Mark Friedman playing a central role.[3] At the core of Friedman's model is the matrix shown in Figure 1.

The matrix includes four quadrants that an organization can utilize in measuring its performance. In the top row are two categories relating to "effort": what quantity and quality of service did the organization deliver? One, in the left column, concerns how much the organization produced (quantity). The other concerns how well the organization did its work (quality). Moving to the bottom row, the subject shifts from "effort" to "effect": what are the results of the organization's efforts (effectiveness)? The measures in this row relate to how many and what proportion of people and organizations achieved the desired outcomes. Together the two bottom quadrants measure effectiveness.

From this theoretical model, the Casey Foundation has developed three questions that its performance measurement system will help to answer:

The first question—**what did we do?** (quantity)—asks grantees, for example, to indicate the number of individuals and organizations they are serving or to specify the number and types of products they have developed and disseminated, or the types of services provided.

The second question—**how well did we do it?** (quality)—focuses on the character of the grantee's work. For example, what percent of the target audience evaluates the organization's work favorably on dimensions of quality such as usefulness, timeliness, accessibility, accuracy, responsiveness, effectiveness, respectfulness, and the like?

The third question—**what difference does it make?** (effectiveness)—is the most important, because it focuses on the outcomes of the program's activities. The least important is the first—the quantity of activities. When choosing performance measures, organizations ought to focus their selections accordingly.

FIGURE 2

Relative Importance of Performance Measures[4]

NOT ALL PERFORMANCE MEASURES ARE CREATED EQUAL	
1. Quantity	Least Important
2. Quality	▼
3. Effectiveness	Most Important

The Casey Foundation's Approach

Based on this model, the Foundation developed an approach for measuring the performance of its grantees and the individual programs as a whole. The same approach and the same categories are used to measure the organizational performance of the Foundation itself.

FIGURE 3

Casey Results Model

IMPACT	INFLUENCE	LEVERAGE
Improvement in the success and well-being of the families and children we serve.	Change in policies, systems, practices, and opinions that support strategies that work.	Investments by public and private funders in strategies that work.

Casey defines results in the three categories listed below and also summarized in Figure 3:

- *What impact are you having?* Students, schools, families, and neighborhoods served; improvements in knowledge, skills, attitude, behavior, and circumstances among those who are directly served by the program.

- *What influence are you having?* Partnerships formed, ideas adopted by other organizations, and changes in the community environments, institutions, systems, programs, and policies that impact members of the target audience.

- *What leverage are you having?* Additional investments that are attracted directly or indirectly by Casey's investment through a variety of funding sources and designs.[5]

Value of the Results-Based Accountability Framework

Casey uses this framework for several reasons:

- *Refining the strategic focus of the education program.* This framework has required the education program to think very carefully about the entire value chain, from vision through barriers to theory of change to investment strategies to what counts as success. This systematic thinking forces decisions, prioritization, and the like, sharpening the focus of grant making over time.

- *Guiding selection of investments.* Knowing what the program wants to achieve helps staff decide whether particular candidates for investment fit.

- *Evaluating specific investments.* Investment-specific evaluation can spur improvement in grantee performance and help the Foundation decide whether and how to continue investing in particular grantees.

- *Evaluating the portfolio as a whole:*

  - *Completeness and coverage.* Investments can be categorized by the various category schemes as well as other categories. Investments can also be categorized by whether they are small or large; whether they are risky or more conventional; and along other important dimensions. This sorting allows the Foundation to see what components of the overall framework are under- and overrepresented.

  - *Results.* Combining individual grantee results to the investment area level or to the portfolio level allows the education program to hold itself accountable for overall performance and results.

The framework also benefits the grantee by:

- *Helping grantees sharpen their focus.* By asking grantees to develop plans for measuring performance and results in this framework, the process engenders the same kind of careful thinking in grantees that the Foundation itself has had to do. The result is more focused planning on the part of grantees.

- *Helping grantees better manage and improve their programs.* By asking grantees to develop specific performance measures that can be tracked over the short and long term, program problems can be spotted early on and multiyear trends can be discerned and analyzed. This can lead to program improvements.

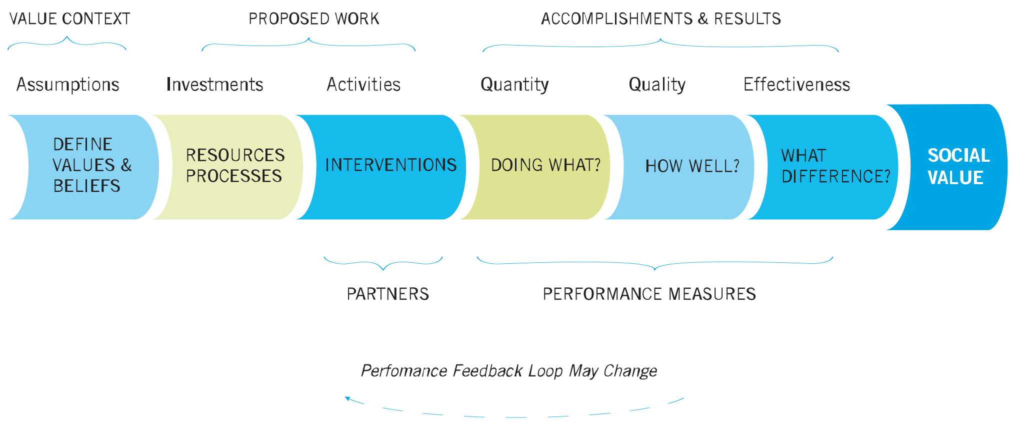
- *Helping grantees to communicate their successes and added value.* By asking grantees to report on performance results, the process helps grantees to create a complete range of outcome data that they can use to demonstrate the effectiveness of their work. Many grantee partners and other funders appreciate seeing these concrete indicators of performance.

The education program describes the process as a "value chain" depicted in the diagram (Figure 4). The chain illustrates the progression from the Foundation's value context to its proposed work, leading to accomplishments and results that ultimately produce social value. This social value is the way in which the world is made better by the investments that the Foundation makes in enterprises that contribute to preparing young people for adult success and well-being in the worlds of work, family, and citizenship.

At the bottom of the chart, an arrow loops back: what the Foundation learns about its investments and investment processes feeds back to inform its thinking about what to do next. Examining performance results helps create this continuous learning cycle that

FIGURE 4

The Foundation Investment Value Chain



strengthens the work of the Foundation and its grantees over time, yielding more social value in the long term.

For a more detailed discussion of this viewpoint and approach see the following:

- *A Road to Results: Results-Based Accountability in the Annie E. Casey Foundation's Education Program* at www.aecf.org
- *A Road to Results 2006: Investing Resources to Achieve Results* at www.aecf.org

Putting the Approach into Practice: A Message to Grantees

As part of the grant process, grantees enter into a grant agreement with Casey that includes a scope of work and performance measures organized within this framework. These performance measures become a central organizing principle for your reports to the Foundation. *In essence, you are asked to explain to the Foundation what you have done, how well you have done it, and what difference it has made in terms of impact, influence, and leverage.* Not every grant will address all areas of impact, influence, and leverage, but you should report on those measures that do apply to your grant. You should not view the performance measurement process as threatening. It is a chance to work on continuously improving your program to achieve the best possible results. This guidebook will guide you through the process.

The Casey Foundation is continuing to develop and improve its performance measurement process. You are encouraged to take an active role by making comments and suggestions to the Foundation to help the process better serve the Foundation and better serve you. (See Appendix C for a feedback form.) If you have any questions that aren't answered by this guidebook, please contact your program officer at the Foundation for assistance. The Casey Foundation wants to make this process as helpful as possible and will be there to help you as you implement it.

This section will guide you through the process of selecting performance measures for your program. This process has three steps:

- Using Casey common measures
- Selecting optional performance measures
- Creating new performance measures

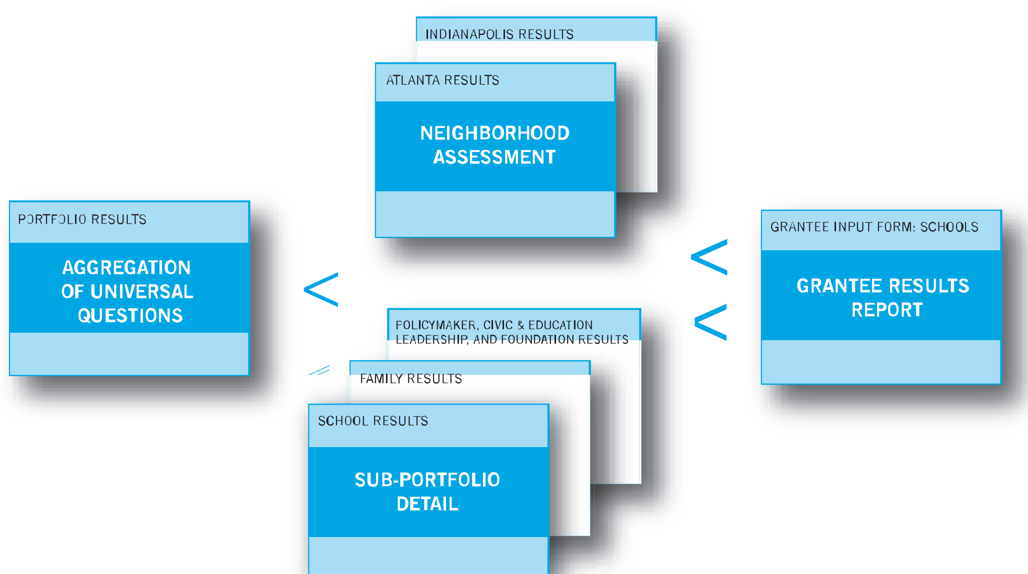
For the education program and the Foundation as a whole to track their performance, they need to examine the cumulative results of all education investments. To make this possible, all grantees are asked to report on common performance measures. These common measures address impact, influence, and leverage through data available to most grantees. By gathering the same data for all grantees, the education program is able to compile all of the results to better understand the impact, influence, and leverage of the Foundation's education program as a whole and each of the program's investment areas.

The education program will aggregate outcomes within three sub-portfolios: grants that create or assist *schools,* grants that target *families*, and grants designed to influence *policymakers, civic and education leaders, and funders.* The education program will also look at the set of universal questions asked of all grantees to track the overall success of its grant making. Finally, the education program will roll up these results by neighborhood in the relatively few places where it is part of a larger Foundation effort in a specific neighborhood. This neighborhood assessment will allow the education program to test, diagnose, and modify (as necessary) its efforts to improve neighborhood results. Figure 5 summarizes how the education program will aggregate your results with those of other grantees in order to gain an overall picture of the outcomes of its grants.

In addition to reporting the common measures, you have the opportunity to select and design a few additional performance measures that will help you measure how successful your program is at fulfilling its mission. Although all the grantees in the educational program seek to improve K-12 education, each has a different approach, so the same performance measures are not always appropriate for everyone. By selecting your own performance measures, you will be able to choose or design measures that will allow you to use good quality data to examine your program's unique outcomes.

FIGURE 5

Aggregate Outcomes



Together with other reporting requirements, the common measures and additional self-selected measures will provide the Foundation with a picture of how each grantee and the entire education program collectively are performing. In Appendix A, you will find a worksheet to help you keep track of the performance measures you will include as part of your reports to Casey. The sections that follow provide some general guidance about measuring performance within the Casey framework. For more in-depth discussion of issues in performance measurement, see the list of Helpful References on pp. 33–34.

Common Measures

The education program asks all of its grantees to report on a core set of performance measures to provide a basic and comprehensive picture of how the grantees are performing across a variety of sites and related or similar activities. Most of these measures are general and will apply to most grantees. However, you will probably not use all of the measures in your report.

Influence and leverage measures are typically universal, but some of the required impact measures may not be relevant to your program. To help identify which impact measures best fit your organization, the impact measures are divided into the categories of school, student, family, and school professional measures. Figure 6 shows the different groups of performance measures.

If your program doesn't work with one of these groups, you can rule out the measures in that category and focus on the ones that fit your program. See Appendix A for guidance on which measures apply to all programs, and which ones apply specifically to you.

Organizations that work primarily on policy influencing may want to skip the section on common impact measures altogether and focus on influence and leverage measures starting on page 11 and the section on adding your own measures on page 12.

Listed in Charts 1, 2, and 3 are the common performance measures that you are asked to use. You will notice that all the measures are divided up between impact, influence, and leverage. The number of performance measures may seem overwhelming at first, but you will find that most of them are very simple to measure and report.

The impact measures listed in Chart 1 are intended to measure improvements in the well-being and success of those directly served by your program.

FIGURE 6

How Different Measures Apply

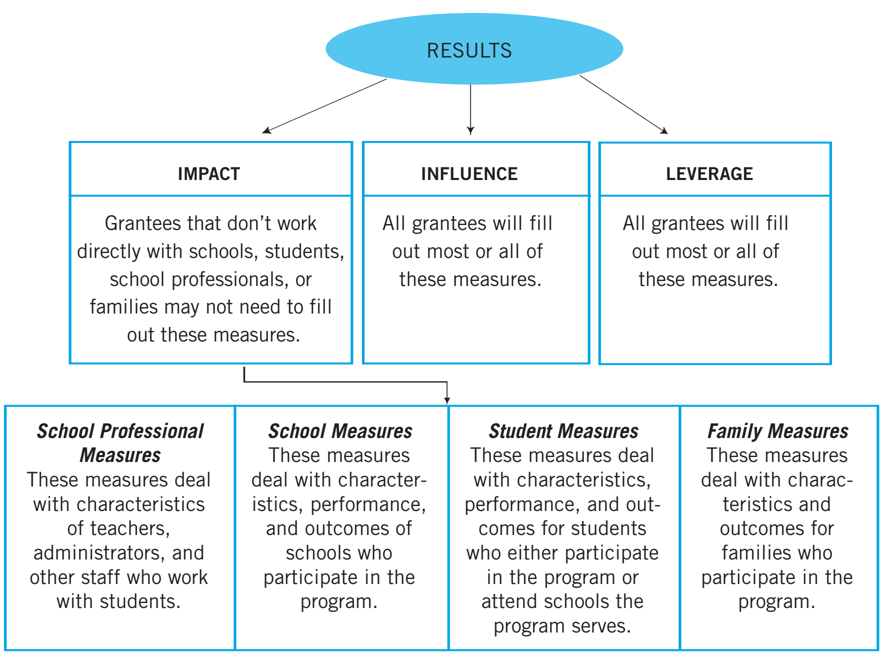


CHART 1

Impact: Common Casey Performance Measures

MEASURE	DESCRIPTION	RATIONALE	SOURCE
PARTICIPANT SATISFACTION	the number and percent of participants (students, parents, teachers, etc.) who are highly satisfied, satisfied, and not satisfied with the program	demonstrates whether or not participants consider the program successful	surveys of participants, which can be distributed annually or as a part of the program schedule
SCHOOL MEASURES			
NUMBER OF SCHOOLS	the number of schools that the grantee works with	shows the quantity of work accomplished	program records
NEW SLOTS FOR STUDENTS	new spaces for student enrollment that were created as a direct result of the program activities	shows the program making educational options more available to students	school records
ADEQUATE YEARLY PROGRESS	whether or not the school met the require-ments for Adequate Yearly Progress according to requirements of No Child Left Behind	provides information about the academic performance of the school as a whole	school report card issued by the state as required by No Child Left Behind
ATTENDANCE RATE	the average number of students enrolled at the school who are actually in class each day	reflects the climate of the school	school or state records
NUMBER OF DISCIPLINE INCIDENTS	instances of discipline that are dealt with by school administrators (includes suspensions and expulsions)	reflects the climate of the school	school records
STUDENT MEASURES			
NUMBER OF STUDENTS	either the number of students taking part in the program or the number of students enrolled in the schools in the program	shows the quantity of work that the program has accomplished	program records or school records
NON-WHITE STUDENTS	number/percent of students in the program who are not white or Caucasian	shows whom the program benefits	program records or school records
STUDENTS RECEIVING FREE OR REDUCED-COST LUNCH	number/percent of students in the program who are eligible for free or reduced-cost lunch according to federal guidelines	shows whom the program benefits	program records or school records
GRADUATION RATE	percentage of students in the program who receive a high-school diploma in a set number of years	reflects achievement motivation of program participants	school records
RATE OF STUDENTS PURSUING POST-SECONDARY EDUCATION	number of students in the program who continue their education after graduating from high school (four-year college, two-year college, technical school, etc.)	reflects achievement motivation of program participants	program or school records
PERFORMANCE ON NATIONAL TESTS	percent of students in the program who achieved a score that is considered proficient on any nationally normed test (e.g., MAP, NEAP)	measures academic performance of students and academic impact of program	test results obtained from school
PERFORMANCE ON STATE TESTS	percent of students in the program who achieved a score that is considered proficient on state tests	measures academic performance of students and academic impact of program	school report card issued by the state as required by No Child Left Behind

CHART 1 CONT'D

Impact: Common Casey Performance Measures

MEASURE	DESCRIPTION	RATIONALE	SOURCE
FAMILY MEASURES			
NUMBER OF FAMILIES	the number of families that participated in the program	shows the quantity of work accomplished	program records
SCHOOL PROFESSIONAL MEASURES			
NUMBER OF STAFF TRAINED	all school staff (teachers, administrators, etc.) who were trained by the program	shows the quantity of work accomplished	program records or school professional development records

The influence measures in Chart 2 are intended to show changes in opinions, policies, and practices as a result of your program's activities.

CHART 2

Influence: Common Casey Performance Measures

MEASURE	DESCRIPTION	RATIONALE	SOURCE
PUBLICATIONS PRODUCED	the names of all publications produced by the grantee and the number of copies of each distributed	shows the extent to which the grantee has influenced opinion	grantee records
PRESENTATIONS/ WORKSHOPS GIVEN	the names of all presentations or workshops that the grantee gave and the number of attendees at each	shows the extent to which the grantee has influenced opinion	grantee records
NUMBER OF SCHOOLS UNDERTAKING SIMILAR PROGRAMS	schools that are not part of the grantee's program that have implemented programs or processes similar to the grantee's	shows how much the grantee has influenced practices	information from schools
NUMBER OF SCHOOL DISTRICTS UNDERTAKING SIMILAR PROGRAMS	school districts or networks of schools that don't work directly with the grantee but are undertaking similar programs and processes	shows how much the grantee has influenced practices	information from school districts
NUMBER OF ORGANIZATIONS/ FOUNDATIONS SUPPORTING SIMILAR PROGRAMS	community organizations and foundations that are providing either financial or non-financial support to organizations or schools using programs similar to the grantee's	shows how much the grantee has influenced practices	information from organizations or foundations
NUMBER OF POLICYMAKERS/ LEADERS SUPPORTING SIMILAR PROGRAMS	policymakers or leaders who have provided support (endorsements, policy initiatives, financial support, etc.) for programs and processes similar to the grantee's	shows how much the grantee has influenced opinions and policy	information from policymakers/leaders

The leverage measures in Chart 3 are intended to reflect increases in investment in the area your program addresses due to your program's activities.

CHART 3

Leverage: Common Casey Performance Measures

MEASURE	DESCRIPTION	RATIONALE	SOURCE
NUMBER OF PARTNERSHIPS WITH SCHOOLS	schools that are not participants in the grantee's program but work with the grantee	shows strength of community support for program	program information
NUMBER OF PARTNERSHIPS WITH SCHOOL DISTRICTS OR NETWORKS	school districts or networks that are not part of the grantee's program but work with the grantee	shows strength of community support for program	program information
NUMBER OF PARTNERSHIPS WITH COMMUNITY ORGANIZATIONS	community organizations that are providing support to the grantee's program	shows strength of community support for program	program information
NUMBER OF PARTNERSHIPS WITH EXPERTS	experts who provide support or advice to the grantee	shows strength of community support for program	program information
DIRECT FUNDS ATTRACTED	funds that are invested into the grantee's program as a result of Casey's investment	shows investment into the grantee's program	program information
INDIRECT FUNDS ATTRACTED	funds that are invested into similar or related programs as a result of Casey's investment in the grantee's program	shows investment into the grantee's ideas	program information

Selecting and Creating Additional Performance Measures

While the common measures are good measures for examining how the education program in general is performing, other measures may also be useful for examining the performance of your specific program. For this reason, the Casey Foundation would like you to come up with a few additional measures to evaluate and report your program's performance more accurately. You can choose from the list of performance measures at the end of this section, or you can create some of your own.

This doesn't mean that you will need dozens of new measures; a few good quality measures are enough. Success is not measured by the number of performance measures you use, and there is no magic number.

The most important aspect to consider when adding performance measures is the program goal that you seek to assess. Many performance measures can give you information about your program, but they are helpful only if they tell you whether or not your program is effectively meeting its goals. For example, imagine your mission is to increase the graduation rate of students attending a certain school. A performance measure that looks at student performance on standardized tests may be interesting, but unless it can be linked directly to the desired outcome (more students graduating), it doesn't tell you if your program is successful.

Creating a performance measure takes four steps:

1. Determine the question you want to answer.
2. Decide on the data you will use.
3. Refine your question until it is simple enough that your data will be able to provide a concrete answer (either a yes or no answer or a concrete number result).

4. Determine the calculations necessary to provide a concrete answer.

In some cases, you may be able to skip some of these steps by selecting performance measures created by others that can be used to answer your questions. (See charts 4, 5, and 6 for examples of frequently used performance measures.)

The first step in picking effective performance measures is to decide what questions you want to answer. What results do you need to see to be sure that your program is achieving its goals?

For example, if the mission of your program is to increase the involvement of economically disadvantaged families in their children's education, there are several questions you may want to ask:

- Is your program serving its target audience (economically disadvantaged families)?
- Has the program increased parent awareness of ways to be involved in their children's education?
- Are parents making efforts to become involved in their children's education?
- Are parents succeeding in their efforts to become more involved?

As you can see from the example, there are many relevant questions about a single goal. Once you have decided the questions you want to answer, your next step is to choose the data that you will use. Depending on your program, there are several possible approaches:

- Look at school data that are available in places such as the state department of education website;
- Survey your participants;
- Observe participants' actions directly.

You will probably find that much of the data you need to measure performance is already being collected by your program, schools, other organizations, or the state or district. There also may be some performance measures that require you to begin collecting new data. Sometimes collecting new data will be a simple matter of recording information that is readily available, such as the number of participants at an event that your program hosts. But you may also need to create a few new data collection processes, such as surveys or observation protocols. For information about data collection methods, see the additional resources listed in the Helpful References section.

Good data are critical—without good data even the best performance measure is meaningless. You may want to spend some time learning about data quality issues such as validity and reliability before you begin creating your new measures. Again, you can find resources listed in the Helpful References section.

Once you know the questions you want to answer and the data you will use, refine your question until your data can provide you with a concrete answer and determine the calculations you will need to make.

Example: Imagine that your organization is working to improve the academic performance of minority students in the schools your program serves. To determine if you are succeeding, you will probably need multiple performance measures, some of which you may need to create. To do this, you should consider following these four steps:

STEP 1: The question you want to answer is: "Is the performance gap closing between non-white and white students at the school?"

STEP 2: There are many ways to answer this question, but you want to be sure that the data you use and therefore the answer you get are high quality. One easily accessible source of data for this question may be the results of different racial and ethnic groups on state tests.

STEP 3: To answer your question, you need to define exactly how you will measure a decrease in the performance gap. One way would be to determine whether non-white students at the schools are catching up with white students on the state test results. You might refine your question to be: Is the average rate of improvement on state tests by non-white students greater than the average rate of improvement on state tests by white students? This is a question you can answer.

STEP 4: You will need to calculate the average rates of improvement on the state tests for each of the different groups (white and non-white) using the test data you have, and then find the difference between them. This number will answer your question and give you objective information to use to evaluate the performance gap.

To fully assess the program you would also need other indicators (e.g., absolute performance of minority students, absolute performance of white students, and graduation rates), which would help you to be sure that you are achieving your goals.

A good performance measure is one that has:

- COMMUNICATION POWER: communicates data to all of your audiences in a way that they understand.
- PROXY POWER: says something important about your organization or program.
- DATA POWER: uses good quality data that can be obtained on a reliable basis.[6]

There are challenges associated with measuring impact, influence, and leverage. Impact is often hard to discern, especially when a program or service is one of many factors that affect a result. In these cases, it is best to think about the contribution a program or activity made to the overall impact, since the overall impact cannot be attributed to any one program.

Although impact measures may measure the most obvious result of your activities, it is crucial for programs to measure influence and leverage outcomes as well. This is especially true for advocacy or policy initiatives, which have less direct impact on children and families. To help create useful influence and leverage measures, consider what influence and leverage outcomes are critical to your efforts.

For example, for a charter school initiative that intends to influence the district schools in the area, it would be essential for the charter school effort to receive attention from the district. Such an effort would want to include an influence measure evaluating the degree to which district schools were adopting core practices of the charter school, such as an annual count of the number of such adoptions. This example also illustrates the difficulty of determining a program's contribution to an effect. A way to examine the charter initiative's

OUTCOME CATEGORIES FOR MEASURING POLICY AND ADVOCACY:

1. SHIFTS IN SOCIAL NORMS: changes in the knowledge, attitudes, values, and behaviors that comprise the normative structure of culture and society.

2. STRENGTHENED ORGANIZATIONAL CAPACITY: improvements in the skill set, staffing and leadership, organizational structure and systems, finances, and strategic planning among nonprofit organizations and formal coalitions that plan and carry out advocacy and policy work.

3. STRENGTHENED ALLIANCES: increases in the level of coordination, collaboration, and mission alignment among community and system partners—including nontraditional alliances.

4. STRENGTHENED BASE OF SUPPORT: increases in the grassroots, leadership, and institutional support for particular policy changes.

5. IMPROVED POLICIES: progress through the stages of policy change in the public policy arena, including policy development, adoption, implementation, and funding.

6. CHANGES IN IMPACT: the ultimate changes in social and physical lives and conditions that motivate policy change efforts.

Outcome categories come from Casey's *A Practical Guide to Measuring Advocacy and Policy.* For suggestions of other useful information in the guide, see the Helpful References section of this guidebook.

contribution might be a count of how many district schools contacted the program for advice or help.

You will notice that some of the influence measures mentioned earlier use the number of publications and presentations. These are useful ways to measure influence, but they don't tell you whether or not the information reached the right people. For this reason, it is important to also include measures of the actions and opinions of those you wish to influence.

Leverage can be particularly complicated to measure. It is relatively easy to total up other public and private dollars flowing to a given activity, but how much of that was truly leveraged by the Casey investment? In other words, how much of that additional money would not have flowed in without Casey's role? To help answer these questions, Casey has developed an initial leverage typology that defines different types and methods of funding that are more or less closely tied to the Casey investment (for details, see Appendix B).

For more information on influence and leverage measures, see Casey's *Practical Guide to Documenting Influence and Leverage in* Making Connections *Communities* listed in the Helpful References section.

Charts 4, 5, and 6 include some performance measures that are often used by organizations to measure their performance. You may want to select some of these measures or include measures already in use by your organization or required by other funders.

You may find that the list of performance measures doesn't include a measure to answer all of your questions. In that case, look for other sources of performance measures or create your own. Keeping in mind that no single performance measure can tell you whether or not a program is successful, you may want to create or select several performance measures that work together to give you a clearer picture of your program's success.

Once you have selected and developed a set of performance measures to fit your program, ask yourself if there are any aspects of your work that are not being covered. Altogether, the set of performance measures that you have created should give the Foundation and your organization a clear sense of what you are achieving.

You will probably find that you have questions as you go through this process; work with your program officer at the Foundation if you need help.

To help you visualize what a set of performance measures looks like, Chart 7 has some examples of the collections of performance measures Casey grantees have used in the past.

CHART 4

Impact: Possible Additional Measures

MEASURE	DESCRIPTION	RATIONALE	SOURCE
COST EFFICIENCY	amount of money that the program costs per student, family, or school worked with	measures how well the program is able to make use of money to produce results	grantee records
SCHOOL MEASURES			
STUDENT RETENTION RATE (W/IN YEAR)	extent to which students who started the school year at the school are still attending the school at the end of the school year	shows the climate of the school	school records
STUDENT RETENTION RATE (BTWN. YEARS)	extent to which students who are eligible to return to the school the following year actually do return	shows the popularity of the school	school records
STUDENT TEACHER RATIO	number of students there are for each teacher at the school	shows the climate of the school	school records
STUDENTS ON WAITLIST	number of students on the waitlist when the school year officially begins	shows the popularity of the school	school records
RATED PERSISTENTLY DANGEROUS	based on the requirements of No Child Left Behind, schools should be rated either persistently dangerous or not persistently dangerous	shows the climate of the school	school records
STUDENT MEASURES			
ENGLISH LANGUAGE LEARNERS	number/percent of students who do not speak English as their primary language	measures who the program serves	school or program records
SAT SCORES	average scores that students in the program achieved on the sections and overall on the SAT	measures academic performance of students and academic impact of program	school or state records
ACT SCORES	average scores that students in the program achieved on the individual sections and overall on the ACT	measures academic performance of students and academic impact of program	school or state records
PSAT SCORES	average scores that students in the program achieved on the individual sections and overall on the PSAT	measures academic performance of students and academic impact of program	school or state records
AP EXAMS	number of students who took AP exams, the average number of AP exams that students took and the percent of students scoring above a 3 on the AP exams	measures academic performance of students and academic impact of program	school or state records
COLLEGE ATTENDEES NEEDING REMEDIATION	number/percent of students from the program who need remediation at the college that they attend	measures college readiness of graduates	college records
COLLEGE GRADUATION RATE	number/percent of students from the program who attend college and ultimately graduate, including the number who graduate on time	measures the continued academic success of students once they have completed the program	college records

CHART 4 CONT'D

Impact: Possible Additional Measures

MEASURE	DESCRIPTION	RATIONALE	SOURCE
FAMILY MEASURES			
PARENTS ATTENDING INFORMATION SESSIONS	number/percent of parents in the program who attend sessions where information about the school is provided	shows parent involvement	attendance records from school events or survey of parents
PARENTS ATTENDING PARENT TEACHER CONFERENCES	number/percent of parents who attend at least one meeting with their child's teacher to discuss the child's progress	shows parent involvement	survey of parents or teacher records
INCREASED AWARENESS OF OPTIONS	parents' knowledge about educational options available to them	measures parents' knowledge about the school	survey of parents
VISITS TO SCHOOL WEBSITE	number of hits that the school website receives	measures parents' knowledge about the school	hit counter on website
PARENTS ATTENDING SCHOOL BOARD MEETINGS	number/percent of parents in the program who attend at least one school board meeting	shows parent involvement	school board meeting attendance records or parent survey
PARENTS ATTENDING EDUCATION REFORM EVENTS	number/percent of parents who attend events focusing on education reform	shows parent involvement	survey of parents
SCHOOL PROFESSIONAL MEASURES			
AVERAGE YEARS WORKED	average number of years that a teacher at the school has worked as a teacher	shows the quality of teachers	school records
HIGHLY QUALIFIED TEACHERS	number of teachers at the school who are Highly Qualified under NCLB	shows the quality of teachers at the school	school records
TEACHERS WITH DEGREE IN SUBJECT TAUGHT	number of teachers who have a college degree in the subject that they teach	shows the quality of teachers at the school	school records
TEACHERS WITH ADVANCED DEGREE	number of teachers with a graduate degree	shows the quality of teachers at the school	school records
TEACHERS WITH NATIONAL BOARD CERTIFICATION	number of teachers certified by the National Board for Professional Teaching Standards	shows the quality of teachers at the school	school records

CHART 5

Influence: Possible Additional Measures

MEASURE	DESCRIPTION	RATIONALE	SOURCE
NUMBER OF PROPOSALS MADE BY PARENT GROUPS	proposals made by parent groups to teachers, the school, or the school district for programs or changes that they would like to see implemented	measures the influence of parents	records of parent groups
NUMBER OF APPEARANCES IN MEDIA	number of articles or TV segments that mention the grantee's program	measures the extent of exposure that the program has	magazines, TV news, newspapers, etc.
NUMBER OF ELECTRONIC COMMUNICATIONS	number of e-newsletters and other electronic communications sent out	measures the extent to which the grantee has influenced opinions	program records
WEBSITE HITS	number of times that the program's website has been viewed	measures the extent to which the grantee has influenced opinions	website hit counter
NUMBER OF POLICY-MAKERS MAKING POLICY TO SUPPORT PROGRAM	number of policymakers who are actually making policy to help support the program	measures how much influence the grantee has on policy	public policy records
AWARENESS OF ISSUE	percent of the public that is aware of the issue that the program addresses	measures how much program has influenced social norms	survey
PUBLIC SUPPORT OF THE ISSUE	percent of the public that is in support of the way the program addresses the issue as compared the percent of the public that is opposed	measures how much the program has influenced social norms	survey
NUMBER OF PEOPLE INVOLVED IN THE PROGRAM	number of people who are involved in the program in some capacity	measures the public support of the program	program records
NUMBER OF PEOPLE VOTING IN ELECTIONS	number and percent of people who choose to vote in elections that affect educational outcomes such as the school board	measure the extent of public involvement	state or local election records
EXTENT OF POLICY IMPROVEMENT	policies that the program explicitly supports as a part of their efforts and the amount of progress that has been made toward bringing the policies about	measures the extent of progress toward policy improvement	public record

CHART 6

Leverage: Possible Additional Measures

MEASURE	DESCRIPTION	RATIONALE	SOURCE
Number of Partnerships with Foundations	all foundations who have provided support or advice to the grantee	measures investment into the ideas and programs of the grantee	grantee records
In-kind Donations	any non-monetary donations, for example, time or supplies or pragmatic support	measures investment into the program	grantee records

CHART 7

Examples of Performance Measures Used by Grantees

GRANTEE	OBJECTIVES	PERFORMANCE MEASURES
INDIANAPOLIS MAYOR'S OFFICE CHARTERING EFFORT Indianapolis, Indiana	Mission: To charter the highest quality schools to serve the children of Indianapolis. Purpose of Grant: Continue to develop the accountability process, including developing handbooks, completing protocols, refining planning processes, and developing and disseminating the 3rd annual Accountability Report.	QUANTITY • # of schools created and students served • % of disadvantaged students • # and types of tools produced for holding schools accountable QUALITY • Satisfaction of parents, teachers, and students • Evaluation of accountability tools *Effectiveness* Impact • Impact of charter schools on academic success *Effectiveness* Influence • # and types of community organizations engaged in starting and operating schools • Degree of dissemination of information about charter school performance • Dissemination of tools to a national audience *Effectiveness* Leverage • Amount of public/private funds flowing to schools • Amount of financial support from facilities fund • Amount of additional funds received by mayor's office
PROJECT GRAD ATLANTA Atlanta, Georgia	Mission: To ensure a quality public school education for all at-risk children in economically disadvantaged communities so that high school graduation rates increase and graduates are prepared to enter and be successful in college. Purpose of Grant: Continue expansion of the project in Atlanta, hire two college support coordinators, enhance the mentoring program, and support visits to college campuses.	QUANTITY • # of high school students visiting colleges • # of mentors and students mentored • # of past graduates tracked QUALITY • % of target audiences evaluating on quality *Effectiveness* Impact • #/% of high school graduates • #/% of post-secondary entrants • #/% of target audiences w/improvements in knowledge, skills, attitude, behavior, circumstances *Effectiveness* Influence • #/% of target audience influenced *Effectiveness* Leverage • % of Casey funding/non-Casey funding
WASHINGTON SCHOLARSHIP FUND Washington, D.C.	Mission: To provide low-income Washington, D.C., families a choice in where they send their children to elementary, middle, and high school and helping fulfill the promise of equal educational opportunity for all. Purpose of Grant: Create a program team to manage outreach, provide information and support to families applying to the program, inform families of options and expand out-reach, and oversee counseling and support services.	QUANTITY • # of individuals served • # and types of schools in program QUALITY • % of customers/target audience evaluating products, activities, and services *Effectiveness* Impact • #/% of target audiences that show improvement in knowledge and opinions *Effectiveness* Influence • #/% of individuals influenced by products and services *Effectiveness* Leverage • % of Casey/non-Casey funding

CHART 7 CONT'D

Examples of Performance Measures Used by Grantees

GRANTEE	OBJECTIVES	PERFORMANCE MEASURES
FOUNDATIONS INC./ PHILADELPHIA CHARTER SCHOOLS Philadelphia, Pennsylvania	Mission: To improve the quality of educational opportunities for children and families by creating and providing products and services to schools and communities. Purpose of Grant: Provide technical, business, and finance services to charter schools; develop accountability and planning tools; increase supports for students and parents; and expand geographical reach.	QUANTITY • # of charter and other school planning grants written and approved by Pennsylvania Department of Education • # of charter applications written and approved by authorizers QUALITY • % of target audience evaluating activities and services *Effectiveness* Impact • #/% of target audience showing improvement in knowledge, skills, and attitude *Effectiveness* Influence • #/% of target audience influenced by products and services *Effectiveness* Leverage • % of Casey/non-Casey funding

PART 3: SETTING PERFORMANCE GOALS

This section of the guidebook addresses what to do once you've selected performance measures: set performance goals, or targets, for those measures. A performance goal is a desired level of results on a specific performance measure within a set timeframe. For example, a performance goal for proficiency on state tests might be 75 percent proficiency at the end of the 2006–07 school year.

While the Casey Foundation doesn't require you to report your performance goals, it is important to set good performance goals for your performance measures in order to get the maximum benefit from the performance measurement process.

Performance goals are important for evaluating results. You might imagine that you do not need performance goals to tell you if a result is good or bad, but results can be misleading. Results that show improvement might not be good enough to fulfill your mission. For example, if your goal is for all of the students in your program to read proficiently by the time they graduate from their school, there is a minimum level of improvement that they must achieve each year in order to reach that goal. It's not enough for the students to improve only a minimal amount if that amount won't lead them to being proficient by the time they graduate.

In addition, whether a program's results are "good enough" may depend on the prevailing norms in a community. A program might be achieving a 68 percent graduation rate among its participants, but whether the graduation rate in the rest of the neighborhood (and the stated goal of the organization) is 40 percent or 90 percent will determine if those results should be viewed as being on the road to success. In short, performance goals help your program maintain a strong focus on achieving its mission by providing a yardstick against which to measure progress.[7]

Setting Performance Goals

There are two types of performance goals you should set for your program: annual and long-term goals. Long-term goals represent the results you would ultimately like to achieve to fulfill your mission, while annual goals represent what you plan to achieve this year in order to ensure that you are making progress toward your long-term goals.[8]

An example of a program that has clear long-term and annual performance goals is No Child Left Behind. As you probably know, the long-term proficiency goal of No Child Left Behind is for 100 percent of students to be proficient on state tests by 2014. In order to meet

CHART 8

Performance Goals

BAD EXAMPLE	WHY IT'S BAD	BETTER EXAMPLE
More third graders will be proficient on the state math test by the end of the year.	NOT SPECIFIC this goal doesn't tell you how many more third graders will be proficient. NOT AMBITIOUS you would meet this goal if even one additional 3rd grader passed the test.	Third grade proficiency on the state math test will increase by 25% by the end of the year.
High schoolers will have more motivation to finish school.	NOT MEASURABLE there is not a good way of measuring whether students are more motivated.	90% of 9th, 10th, and 11th graders will return to school the following fall.
75% of 3rd graders will be enrolled in a research-based reading program by the end of the year.	NOT RESULTS ORIENTED this goal is focused on inputs rather than outcomes of the program.	75% of 3rd graders will be proficient in reading by the end of the year.
90% of 6th graders will score proficient on the state reading test.	NOT TIMEFRAMED this goal doesn't have a time when it is supposed to be achieved.	90% of 6th graders will score proficient on the state reading test by 2010.

this long-term goal, No Child Left Behind has annual goals—levels of proficiency required to meet Adequate Yearly Progress (AYP)—for each school and district, levels that increase over time.

As you set your performance goals, make sure that they are SMART[9]:

SPECIFIC—Your performance goal should be the exact result—usually a number—that you want to achieve on a specific performance measure.

MEASURABLE—Each performance goal should be attached to a specific performance measure, so that at the end of the time period you have chosen you can concretely say whether it was achieved or not.

AMBITIOUS BUT ATTAINABLE—Performance goals should be high enough that your organization has to push itself to attain them while remaining feasible.

RESULTS ORIENTED—Although you will also measure your efforts, most performance goals should focus on program results rather than the effort put into the program.

TIMEFRAMED—Each goal should have a date when it is to be accomplished. For annual goals, this will usually be by the end of the year, but even long-term goals should have a time limit.

Setting ambitious but attainable goals can be difficult, but there are some guidelines to help you.[10]

- TAKE INTO ACCOUNT BASELINE PERFORMANCE. The baseline is how the population is performing at the beginning of the program. This is important because the starting point plays a crucial role in determining what level of improvement can reasonably be achieved. In a school with only 20 percent of its students meeting proficiency in reading, a realistic one-year performance goal would be much lower than it would be in a school with 75 percent of its students meeting proficiency.
- LOOK AT TRENDS. Certain performance measures show a natural improvement or decline that you will want to take into account. It is important to make sure your goals require better results than would naturally occur without the program.
- EXAMINE THE RESULTS OF HIGH-PERFORMING SIMILAR PROGRAMS. These similar programs will give you an idea of what kind of results you can expect to see if you are doing a good job.
- THINK ABOUT IT. Consider the strategies you could use, the resources you have available and the amount of effort that you will invest and use this information to set reasonable goals.

Over time, you will probably end up revising your annual goals and possibly even your long-term goals to reflect progress that has been made or things that you have learned.

In the Helpful References section of this guide, you can find more information about setting performance goals as well as some examples of how other organizations have set and used performance goals.

PART 4: REPORTING PERFORMANCE RESULTS

The next step after selecting performance measures and setting performance goals is measuring and reporting your results. This section will provide you with a process for reporting your results and covers the following topics:

- Using the Casey template to report results, including
  - Customizing the template
  - Collecting data
  - Entering the data
- How Casey uses the results
- How to use your results to provide additional information to Casey and others

This guidebook focuses exclusively on the performance measurement component of reporting results—your interim and annual reports include many additional topics not related to these results, such as financial information, objectives, and activities. This section will, however, briefly discuss how best to incorporate performance results into those reports.

Casey will provide you with an Excel template that you will use to create a complete report on the results of your performance measures. This report will be paired with your interim and annual reports to provide a complete picture of the program. What follows are detailed directions on how to use the provided Excel template to record your results and report them to Casey.

Don't worry if you haven't had much experience working with Excel. You don't need to know much about the program to use this template, and this guidebook will guide you through what you do need to know. If you are interested in learning more about Excel, Microsoft offers a basic online training course at http://office.microsoft.com/training/training.aspx?AssetID=RC012005461033.

Using the Template

There are three steps to using the Excel template to report on your performance measures:

- Customize the template to include your selection of performance measures.
- Collect the data you will need to report on your performance measures.
- Enter the data and send your results to Casey.

If you need help with any of these steps, contact your program officer at the Casey Foundation.

Customizing the Template

When you open the template, look at the bottom of the screen. You will notice there are four tabs labeled: General, Impact, Influence, and Leverage. Each of these links to a specific worksheet into which you will enter data.

The General sheet, shown in Figure 7, asks for basic information about your program and your grant. You should complete all of the information on this sheet.

FIGURE 7

General Sheet

Prepared by: Date:		
General Grantee Information		
Grantee Name:	Total Grantee revenue:	
Location of Grantee (city/state)	% of total grantee revenue:	#DIV/0!
Amount of funding received:	Total project revenue:	#DIV/0!
Scope of work for grant:	% of total project revenue:	

On each of the other three sheets, there are three types of color-coded tables to make the template easier to customize.

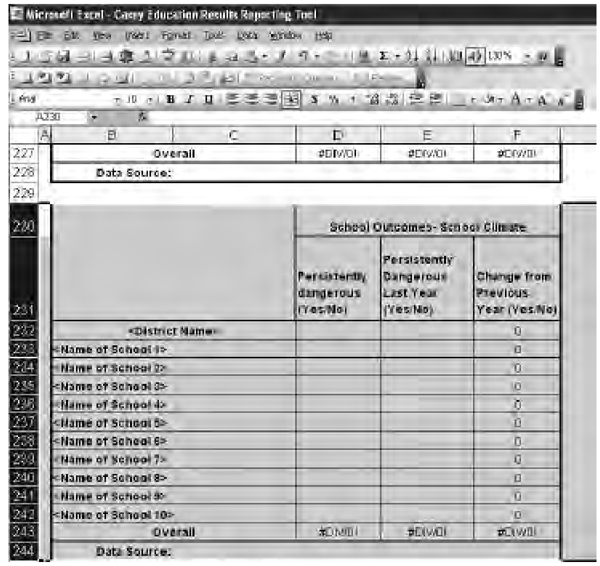
Blue Tables: The tables with blue labels include all of the required common performance measures, discussed in the performance measures section of this guidebook. These tables are ready to use as they are. As described earlier in Figure 5, you may not need to complete all of the common measures.

Gray Tables: You may also recognize the tables with gray labels from the list of performance measures in this guidebook. These are optional performance measures.

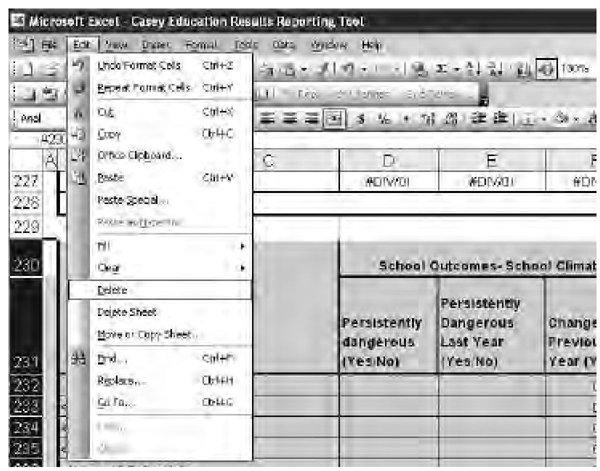
You won't use all of these tables, so once you have decided which optional measures you need in your template, you can delete the others.

To delete the unneeded optional tables:

1. Highlight the rows by clicking on row numbers on the left side of the Excel sheet. To select multiple rows, click and hold the mouse button on the first row number, drag the mouse down to the last row number, and then release the mouse button.



2. Select delete from the edit menu.



3. The selected table will be gone and you can move on to the next one.

Yellow Tables: At the very bottom of each sheet there are blank tables with yellow labels. Enter any new measures that you have created in these tables. At the top of the table where it says "New Measure" replace it with a description of the category the new measures falls into (e.g., student performance, school climate, etc.). Then fill in each of the column headers with labels for the different pieces of data you will need to calculate your new performance measure. See Figure 8 for an example of how to fill in custom measures.

FIGURE 8

Custom Measures Example

Before Customizing

New Measure
<Column Header>
Data Source:

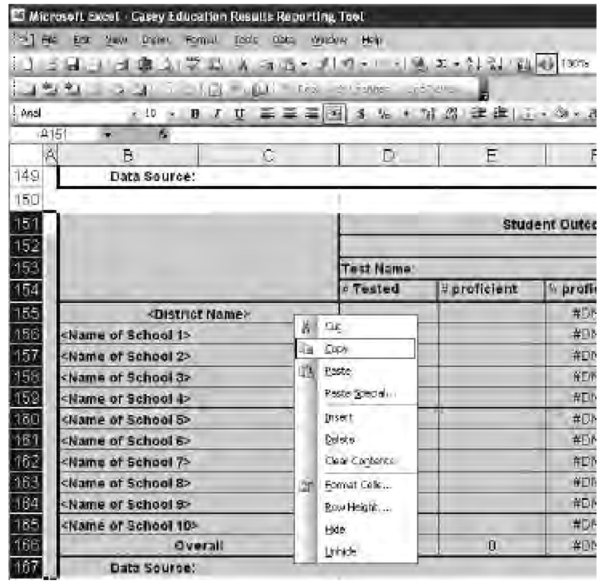
After Customizing

Your Measure's Name
Label for Your Data
Data Source:

Note: In the Excel template, column headers for these tables will be yellow.

If you are comfortable using Excel, you can set up the new table to automatically perform your required calculations (for help using Excel formulas, use online help at http://office.microsoft.com/training/training.aspx?AssetID=RC011870911033). If you aren't comfortable using Excel, simply enter the final results into the table.

If you need additional tables, either because you have more new measures than tables or because you need to duplicate measures that already exist (e.g., you would like to report results for more state or national tests than there are currently room for), simply highlight the table, copy it, and paste it at the bottom of the sheet.



Once you have followed these steps for the Impact, Influence, and Leverage sheets, you will have a completely customized template that is ready for you to begin reporting your performance measures.

Collecting Data

As you look through the template, you will notice that many of the performance measures require more than one piece of data. Each piece of data you need has its own clearly labeled column. To help you, many of the column headers have explanations attached that can be viewed by moving the cursor over the column header cell.

	School Measures	
	New School (Yes/No)	new slots for students
	--	--

The mark in the corner of this column header cell indicates that there is an explanation available which you can view by moving your mouse over the cell. In the actual Excel template, the mark will appear in red.

At first the number of columns may seem overwhelming, but you also will notice that many of the columns are already filled in with either zeros, "--" or "#Div/0!". The "--" notation signifies that no data are needed in that cell. Both the zeros and the "#Div/0!" notation signify that the cell is set to automatically calculate when you fill in the other data in the table ("#Div/0!" occurs when a formula can't be calculated due to mathematical rules making it impossible to divide by zero). You will not need to collect data for any of these cells, but you will need to gather data to fill in all of the empty cells in the tables as shown in Figure 9. Figure 10 demonstrates how the columns you don't fill in will calculate themselves.

FIGURE 9

Before Data Are Entered

	School Outcomes – School Climate		
	Student/Teacher Ratio	Previous yr. Student/Teacher Ratio	Change In Student/Teacher Ratio
<District Name>			0.0
<Name of School 1>			0.0
<Name of School 2>			0.0
<Name of School 3>			0.0
<Name of School 4>			0.0
<Name of School 5>			0.0
<Name of School 6>			0.0
<Name of School 7>			0.0
<Name of School 8>			0.0
<Name of School 9>			0.0
<Name of School 10>			0.0
Overall	#DIV/0!	#DIV/0!	#DIV/0!
Data Source:			

blue = data to collect green = data not needed to collect

FIGURE 10

After Data Are Entered

	School Outcomes – School Climate		
	Student/Teacher Ratio	Previous yr. Student/Teacher Ratio	Change In Student/Teacher Ratio
<District Name>	30.0	31.0	-1.0
<Name of School 1>	25.0	31.0	-6.0
<Name of School 2>	22.0	27.0	-5.0
<Name of School 3>	18.0	22.0	-4.0
<Name of School 4>			0.0
<Name of School 5>			0.0
<Name of School 6>			0.0
<Name of School 7>			0.0
<Name of School 8>			0.0
<Name of School 9>			0.0
<Name of School 10>			0.0
Overall	21.7	26.7	-5.0
Data Source:			

Note the data that you need to collect to fill out these tables; some require surveys and other collection approaches that may require some time to implement.

District Data

As we mentioned in the section on performance goals, the value of a certain result sometimes depends on the context. One comparison that can help put your results in perspective is data on the district in which your program is located. (If your program serves more than one district, you should use the district in which the largest number of your schools or program participants are located or average the relevant districts.)

You will see that many of the tables in the template have a row for district. The data you enter in this row will come from the district as a whole. It is not included in the calculations for the overall row at the bottom of the table, but by having it included in the table, it makes it easy for you to compare the scores that your program achieved to the scores that the rest of the district is receiving.

Entering the Data

After gathering the necessary data, the next step is to enter the data into the template.

As you begin entering data into the Impact sheet, you will notice that the first table at the top asks you to enter the names of the schools you have worked with. As you can see in Figure 11, currently the cells in the table read "<District Name>," "<Name of School 1>," etc.; replace these placeholders with the actual name of the district and the schools you worked with as demonstrated in Figure 12. The rest of the tables in the Impact section will automatically fill in with the names of the schools.

FIGURE 11

Before Data Are Entered

Schools Worked With
<District Name>
<Name of School 1>
<Name of School 2>
<Name of School 3>
<Name of School 4>
<Name of School 5>
<Name of School 6>
<Name of School 7>
<Name of School 8>
<Name of School 9>
<Name of School 10>

FIGURE 12

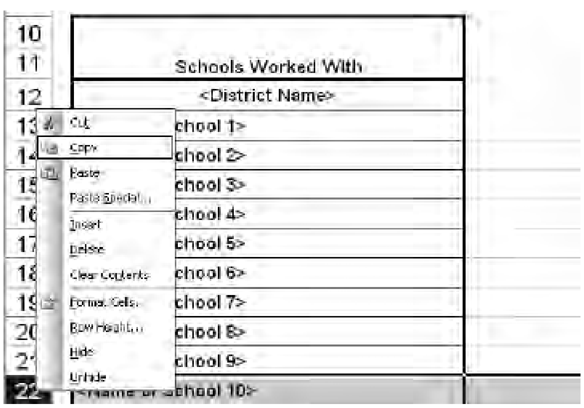
After Data Are Entered

Schools Worked With
Example District
Example Elementary
Example Middle School
Example High School
<Name of School 4>
<Name of School 5>
<Name of School 6>
<Name of School 7>
<Name of School 8>
<Name of School 9>
<Name of School 10>

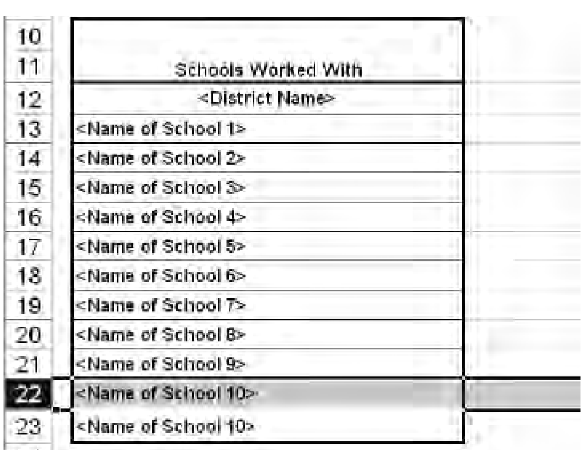
There is space for ten schools in the provided tables. If you have fewer than ten schools, simply leave the other rows as they are.

If you have more than ten schools in your program:

1. Select the last row of the table and choose copy from the edit menu.



2. Select insert from the edit menu to create another row.



3. Repeat this process as many times as you need to get the correct number of schools. (You will need to add rows to each table individually as you go through the template, but they will automatically be included in overall calculations.)

If you do not work directly with schools in your program, simply fill in the program name in the cell of the first table that currently has "<Name of School 1>" in it. (If you have more than one program that is part of the grant, feel free to put the other programs in for the names of the other schools.) You should also fill in the "district" row with an appropriate comparison (e.g., data from the neighborhood your program works in, citywide data, or countywide data).

Once you have your template set up with the correct number and names of the schools, the rest of the data entry process is straightforward. Simply fill in each cell with the correct piece of data for the school or program. As you go, the cells that are set to calculate automatically will update and you will be able to see results for your program in more detail. You will also notice that the tables will calculate overall information for all the schools (or programs) that you work with. Take a look at these numbers to see how your program is doing overall. See Figure 13 for an example of a completed table.

How Casey Uses the Data

Once you have entered all of the data for all of your performance measures into the template, it will be ready to be saved and sent to Casey. (You may want to use the template to help you pull highlights for the narrative report as well.) The specifics of your reporting requirements, including a timeline for when your reports are due, is laid out in your letter of agreement with the Casey Foundation.

These performance measures will give the Foundation a good picture of how your program is performing and the effect that it is having. The common measures you report will be aggregated to provide information on how the Casey educational program as a whole and the entire Foundation are performing. For example, the Foundation will be able to calculate the number of

FIGURE 13

Example of a Completed Table

	Student Outcomes – Academic Performance					
	State Tests					
	Test Name: State Reading Test			Test Name: State Math Test		
	# Tested	# proficient	% proficient	# Tested	# proficient	% proficient
Example District	20000	10532	52.66%	20000	9663	48.32%
Example Elementary	100	58	56.00%	100	35	35.00%
Example Middle School	250	153	61.20%	250	153	61.20%
Example High School	500	435	87.00%	500	352	70.40%
Example Elementary 2	200	153	76.50%	200	153	76.50%
Example Middle 2	500	352	70.40%	500	353	70.60%
Example High 2	1000	435	43.50%	1000	532	53.20%
Example Elementary 3	400	236	59.00%	400	326	81.50%
Example Middle 3	1000	632	63.20%	1000	623	62.30%
Example High 3	2000	1235	61.75%	2000	1832	91.60%
Example Elementary 4	600	352	58.87%	600	326	54.33%
Overall	6550	4039	61.66%	6550	4685	71.53%
Data Source:	state test results as reported on the state education website					

schools, students, and families that were impacted by all the grantees, and they will be able to see the percentage of grantee schools that met AYP, the percentage of students that were proficient on state tests in math, and the number of participants that were satisfied with program performance.

The data and performance results of all the grantees will help Casey examine overall performance and help influence how to direct future efforts to meet Foundation goals. The Foundation hopes that using these performance measures will also help you as a grantee focus your efforts to achieve your goals.

FIGURE 14

Example of Education Program Results Presentation[11]

RESULTS: WHAT DIFFERENCE ARE THEY MAKING?

IMPACT

- 30 schools serving around 8,000 young people in 14 communities
- 13 elementary schools; 8 middle schools; 9 high schools
- 20/27 improving outcomes; 17/27 met Adequate Yearly Progress (AYP under No Child Left Behind); 7 schools doing either the same or worse
- Vast majority of young people attending these schools are from low-income families

INFLUENCE

- 5 schools have undertaken “scale up” activities, creating similar schools in other communities (KIPP, Maya Angelou, SEED, High Tech High, The Met); 2 schools have influenced local replication in districts (White Center, Indianapolis)
- Schools have received numerous recognitions and awards—for example, Indianapolis-Kennedy School Innovations Award in Government; Washington Community School; KIPP; Accelerated, The Met, High Tech High, Maya Angelou, SEED, etc.

LEVERAGE

- All schools have accessed additional public and private dollars for support
- Significant investments in some of these schools by other foundations

Using Your Results

You will be asked to include highlights of your performance results in the narrative of the interim and annual reports to Casey, which are described in your letter of agreement. You will include the results of your most important performance measures in the areas of impact, influence, and leverage. For an example of the types of highlights you might include, see Figure 14. Your reports will also give you an opportunity to include any accomplishments that are not a part of the performance measurement framework, such as awards or recognition and to tell the story behind your organization's accomplishments.

CHART 9. EXAMPLES OF GRANTEE PERFORMANCE HIGHLIGHTS[12]

Mayor's Chartering Effort in Indianapolis

IMPACT:

- 15 new schools chartered since 2000; 10 open in 2004–05
- 1,967 students have new school options in 2004–05, vast majority are from low-income families in tough neighborhoods
- In 2003–04, students gained ground versus peers nationally in 77% of elementary-middle subjects and grades
- 88% of parents satisfied with charter schools in 2003–04

INFLUENCE:

- Numerous key Indianapolis community organizations and leaders have become more deeply involved in public education by starting and supporting charter schools
- Leading national school models are operating Indianapolis charter schools, including KIPP, Big Picture Company, Outward Bound, and Lighthouse Academies
- Increasing interest nationally in mayoral role in public education, including Progressive Policy Institute and National League of Cities meetings in Indianapolis in 2004

LEVERAGE:

- $16 million in public funds automatically flowing to charter schools in 2005–06
- $11.3 million from Bill & Melinda Gates Foundation to create new high schools & break up large high schools
- $1.6 million from Fairbanks Foundation to stimulate supply of new schools
- $3.0 million + in federal charter school start-up funds to Indianapolis charter schools
- $20 million in private capital loan funds now available to charter schools, backed by $1 million Casey PRI loan guarantee
- Extensive private philanthropy supporting individual charter schools

Project GRAD Atlanta

IMPACT:

- 16,000 + students and 1,300 + teachers in 31 Atlanta Public Schools
- 274 students graduate from Booker T. Washington in 2004—largest graduating class in the past 15 years; 121 students enroll in post-secondary education fall 2004
- 18 seniors in the SAT 1000+ Club
- 153 graduates receive Brumley Scholarships of $4,000
- 117 receive Hope Scholarships
- $6 million + in scholarship aid
- Double passing rates from 2000 to 2003 on Georgia state tests
- 4th grade reading scores in cluster schools up by average of 35 percentage points from 2000 to 2003 on state tests
- 6th grade reading scores in cluster schools up by an average of 20 percentage points from 2000 to 2003 on state tests

INFLUENCE:

- Project GRAD expanded to Carver and South Atlanta cluster of 18 schools
- Project GRAD now being implemented in 12 districts across the United States

LEVERAGE:

- 60 + national and local foundations are part of Project GRAD funding consortium, raising over $20 million
- Atlanta Public Schools integrating Project GRAD costs into its operational budget

Center for Policy Studies 2005

INFLUENCE:

- 11 publications, 3 mass e-communications to 1,500 + policymakers and practitioners
- 15 presentations by project leaders reach 2,000 + policymakers and practitioners
- 100 + policymakers and practitioners attend four open sector meetings (two national, two in MN)
- 80 + teachers, teacher organizations, and districts get help creating teacher professional practice schools
- Partnership with Harvard Business School's Clay Christensen results in his:
  - Lead participation in two national forums for 30 top education leaders
  - Commitment to co-author reports applying his research on innovation to education
  - Appearance at major national venues such as ECS National Forum in July 2005
- Minnesota policy influence:
  - Number, range, and quality of charter school sponsors expand in Minnesota
  - Quality Teaching Coalition launched to create interdisciplinary teaching license
  - Broad coalition of charter/new school supporters assisted in framing initiatives on facilities, transport, special education, extra-curriculars, and other issues

LEVERAGE:

- Three funders commit nearly $400,000 to the open sector initiative for 2005
- Minnesota Department of Education commits $175,000 to charter sponsorship

---

In addition to using your performance results to report to Casey, you can analyze the data to judge how well your program is performing. According to performance measurement expert Theodore Poister, there are several standards you can use to analyze your data:

- *Trends over time:* compare your results to past performance to see how things are improving over time.
- *Comparison against standards:* see how well your results measure against the performance goals that you set for your program and against external standards.
- *Comparison among subunits:* see how individual parts of your program are faring by comparing their results.
- *External benchmarking:* compare your results to the results of other similar programs or organizations.

You can also use your results to illustrate your program's success in presentations, on your website, in communications to donors, in press releases, or any other setting where you might need them.

Having all of the results together in this Excel template makes it simple to create charts, graphs, or any other type of display you might desire for your results.

Graphs are an effective way to display your results so that people can really see how much of a difference your program is making.

While a chart is great for showing information that needs to be shared in great detail, you can see clearly in Figures 15–17 below how using graphs can make the same information that is shown in Figure 13 much easier to understand.

FIGURE 15

Example Graph 1: Student Proficiency by School in Both Math and Reading

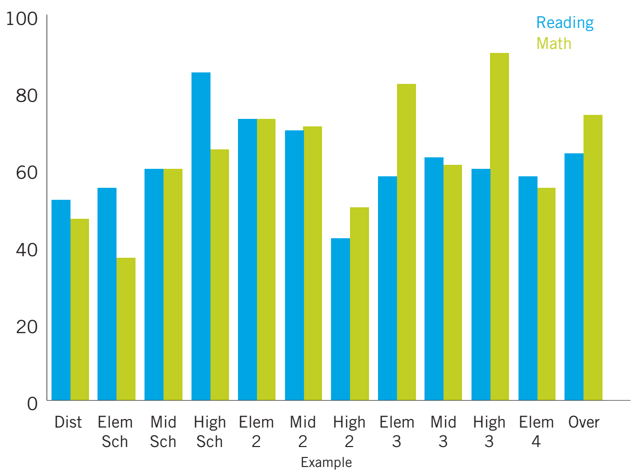


FIGURE 16

Example Graph 2: School by School Comparison to District

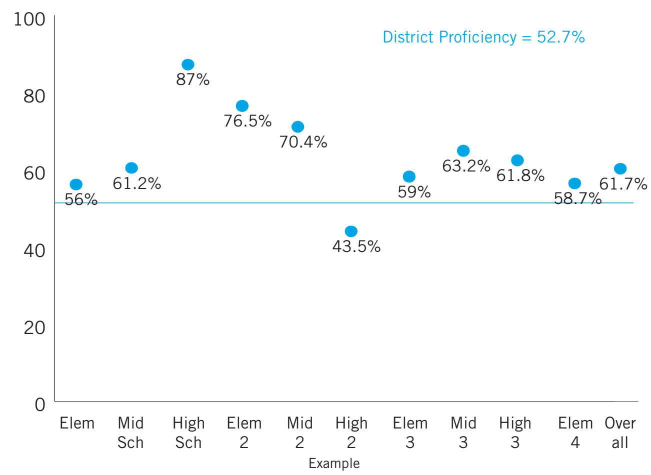
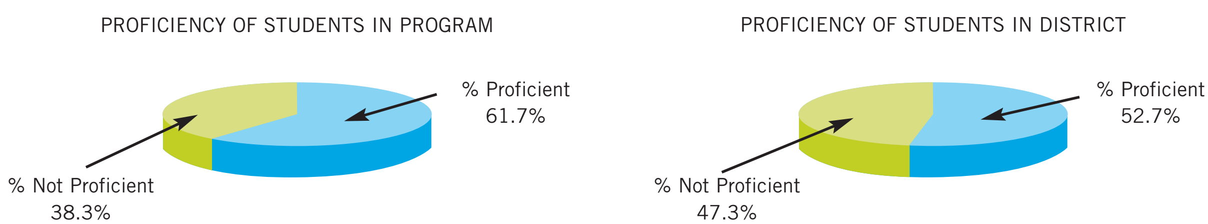


FIGURE 17

Example Graph 3: Overall Program Comparison to District Proficiency



Using these graphs, you can see at a glance the general trends of the data. You can incorporate graphs like these or highlights of the most important performance results into all types of publications and communications.

For help using Excel to create graphs, visit this online course provided by Microsoft: http://office.microsoft.com/training/training.aspx?AssetID=RC011055061033.

CONCLUSION

As this document outlines, the Annie E. Casey Foundation uses a performance measurement system that evaluates the quantity, quality, and effectiveness of programs, specifically focusing on the impact, influence, and leverage of their grantees. Using this system, Casey is able to examine both how their grantees are doing and how the Foundation as a whole is doing at achieving its mission.

As a grantee, you take part in this system by following four steps.

1. UNDERSTAND PERFORMANCE MEASUREMENT: Performance measurement is an important way of using data to make sure that a program is achieving its goals. Moreover, as a grantee, you participate in and help improve the Casey Foundation's performance measurement framework. Finally, you can also use what you know about performance measurement to improve your own program.

2. USE PERFORMANCE MEASURES: Some measures are selected for you by the Foundation and some you select yourself. Together, the measures should give you an accurate picture of what your program is doing, how well it is doing it, and what difference it is making.

3. SET PERFORMANCE GOALS: By setting goals, you can measure whether your program is doing enough to achieve its objectives. You can then make adjustments to help you work more effectively toward fulfilling your mission.

4. REPORT ON PERFORMANCE RESULTS: Reporting results is more than just a requirement of the Casey Foundation. It is also a way for you to show other important audiences what you are achieving.

Now that you have finished reading this guidebook, you should be ready to select performance measures and report to the Casey Foundation on the results of your work. You should also have a better idea of how performance measurement works and how it can help your program fulfill its mission. Since this approach is new to the some parts of the Foundation's work, Casey is eager to improve it over time as it is used. As you implement the system, please send suggestions to the Foundation (See Appendix C for feedback form.) In addition, if you have any questions about this process, please contact your program officer at the Foundation.

HELPFUL REFERENCES

PUBLICATIONS

A Road to Results: Results-Based Accountability in the Annie E. Casey Foundation's Education Program

The Annie E. Casey Foundation, Baltimore, MD, 2006; online at www.aecf.org

This report explains the Casey Foundation's Education Program's approach to results-based accountability.

A Road to Results: Investing Resources to Achieve Results

The Annie E. Casey Foundation, Baltimore, MD, 2006; online at www.aecf.org

This report details the vision, theory of change, and theory of action of the Casey Foundation's Education Program.

Measuring Performance in Public and Nonprofit Organizations

Theodore H. Poister; Jossey-Bass, San Francisco, 2003

This book details all aspects of performance measurement with many useful examples, including discussions of:

- Different types of performance measures and choosing them based on desired program outcomes (Chapter 3)
- Setting performance goals and standards (Chapter 4)
- Ways to collect data, problems occurring during data collection, and information about reliability and validity (Chapter 5)
- Using graphs and charts to present performance results (Chapter 7)
- Using performance measurement in strategic planning (Chapter 9)

A Guide to Developing and Using Performance Measures

Trying Hard is Not Good Enough: How to Produce Measurable Improvements for Customers and Communities

Mark Friedman, 2006; online at www.resultsaccountability.com

The Annie E. Casey Foundation bases much of its approach to performance measurement on the work of Mark Friedman. For more detailed information on the theory behind performance measurement systems, refer to his two publications or his website above.

A Practical Guide to Documenting Influence and Leverage in Making Connections *Communities*

The Annie E. Casey Foundation, Baltimore, MD, 2006; online at www.aecf.org

This document provides guidance on creating and using appropriate performance measures for influence and leverage.

- Identifying influence and leverage outcomes
- Collecting data to measure influence and leverage
- Examples of influence and leverage outcomes with corresponding performance measures and data collection techniques

A Guide to Measuring Advocacy and Policy

The Annie E. Casey Foundation, Baltimore, MD, 2006; online at www.aecf.org

This document provides information about how performance measurement systems can be used in advocacy and policy initiatives that do not work directly with a population and therefore focus much less heavily on impact measures. Some particularly useful features include:

- Six outcome categories for advocacy and policy work

- Explanations and examples of how to use different data collection techniques for each outcome category

Performance Measurement: Getting Results

Harry P. Hatry; The Urban Institute Press, Washington, D.C., 2006; online at www.urban.org

This book walks through the steps of using performance measurement and provides examples that may help illustrate how you can use performance measurement in your own program.

WEB-BASED RESOURCES

www.vital-learning.com/documents/AffiliateLeadership.pdf Vital Learning provides general information about the importance of goal setting and the characteristics of good goals.

www.whitehouse.gov/omb/budintegration/part_assessing2004.html The federal government makes use of performance measures and goals in assessing their programs. This website has the guidance and tools they provide to their programs.

www.whitehouse.gov/omb/egov/documents/How_to_PRM.PDF This document includes federal guidance on how to select performance measures (indicators) and how to set performance goals (targets).

http://pdf.dec.org/pdf_docs/PNABY226.pdf#search=%22performance%20targets%22 USAID provides tips and instructions for their programs on how to set performance goals.

APPENDIX A: PERFORMANCE MEASURES WORKSHEET

This worksheet includes all of the performance measures that are described in the performance measures section of this guidebook. Checks have been placed beside all of the common measures required by Casey. For some grantees, none of the Impact measures apply. For others, only some categories of Impact measures apply (see Figure 5). Put checkmarks beside the Impact categories that apply to you. Within each category, put check marks beside the optional performance measures that you would like to use and add the performance measures you created in the blank spaces provided. Use this worksheet as a guide to help you customize the Excel template that you will use to report your results.

IMPACT

- ☒ Participant Satisfaction
- ☐ Cost Efficiency
- ☐ ______________________________

☐ School Measures

- ☒ Number of Schools
- ☒ New Slots for Students
- ☒ Adequate Yearly Progress
- ☒ Attendance Rate
- ☒ Number of Discipline Incidents
- ☐ Student Retention Rate
- ☐ Student Teacher Ratio
- ☐ Students on the Waitlist
- ☐ Schools That Are Not Persistently Dangerous
- ☐ ______________________________

☐ Student Measures

- ☒ Number of Students
- ☒ Non-White Students
- ☒ Students Receiving Reduced-Cost Lunch
- ☒ Graduation Rate
- ☒ Rate of Students Pursuing Post-Secondary Education
- ☒ Performance on National Tests
- ☒ Performance on State Tests
- ☐ Students for whom English is not Primary Language
- ☐ SAT Scores
- ☐ ACT Scores
- ☐ PSAT Scores
- ☐ AP Exams
- ☐ College Attendees Needing Remediation
- ☐ College Graduation Rate
- ☐ ______________________________

☐ Family Measures

- ☒ Number of Families
- ☐ Parents Attending Information Sessions
- ☐ Parents Attending Student Teacher Conferences
- ☐ Increased Awareness of Options
- ☐ Visits to the School Website
- ☐ Parents Attending School Board Meetings
- ☐ Parents Attending Education Reform Events
- ☐ ______________________________

- ☐ School Professional Measures
  - ☒ Number of Staff Trained
  - ☐ Average Years Worked
  - ☐ Highly Qualified Teachers
  - ☐ Teachers with a Degree in the Subject Taught
  - ☐ Teachers with an Advanced Degree
  - ☐ Teachers with National Board Certification
  - ☐ ______________________

INFLUENCE

- ☒ Publications Produced
- ☒ Presentations/Workshops Given
- ☒ Number of Schools Undertaking Similar Programs
- ☒ School Districts Undertaking Similar Programs
- ☒ Number of Organizations/Foundations Supporting Similar Programs
- ☒ Number of Policymakers/Leaders Supporting Similar Programs
- ☐ Number of Proposals Made by Parent Groups
- ☐ Number of Appearances in Trade Media
- ☐ Number of Electronic Communications
- ☐ Website Hits
- ☐ Number of Policymakers Making Policy to Support Similar Programs
- ☐ Awareness of Issue
- ☐ Public Support of Issue
- ☐ Number of People Involved in Program
- ☐ Number of People Voting in Elections
- ☐ Extent of Policy Improvement
- ☐ ______________________

LEVERAGE

- ☒ Number of Partnerships with Schools
- ☒ Number of Partnerships with School Networks
- ☒ Number of Partnerships with Community Organizations
- ☒ Number of Partnerships with Experts
- ☒ Direct Funds Attracted
- ☒ Indirect Funds Attracted
- ☐ Number of Partnerships with Foundations
- ☐ In-kind Donations
- ☐ ______________________

APPENDIX B: LEVERAGE

The category of leverage is perhaps the hardest to measure because it is often difficult to determine exactly what role Casey's investment in a project played in attracting additional funds from other sources. Casey breaks down the leverage results into direct and indirect funds leveraged. Funds are considered to be direct if they are invested directly into the program that Casey funds. Indirect funds are invested in other organizations that either support similar programs to the program that Casey funds or that work with the program that receives Casey funding.

In order to more clearly assess the part that Casey played in directing funding from other sources into your program or other programs that you work with, the Foundation has developed an initial typology with seven categories into which you can place the funds that you list in your leverage results:

- MATCHED FUNDS contributions to an activity where the amount of the Casey investment is contingent on the commitment of a specific amount of funds from other investors.
- DIRECT FINANCIAL SUPPORT financial commitments from other investors to offset the cost of implementing activities initiated by Casey.
- CO-INVESTMENT contributions from other investors into projects intentionally aligned with Casey activities.
- FUNDING COLLABORATIVE pooled funds from several sources which Casey directed into funding the program.
- MARKET INFLUENCE private for-profit investment in community economic development.
- PUBLIC REINVESTMENT reallocation of public funds into programs and models developed as alternatives to more expensive, more restrictive programs.
- NEW PUBLIC FUNDS public funds that were not previously directed toward achieving the goals of the program.

If your program received funding that is connected to the grant you received from Casey but that does not fit into any of these categories, either place it into the category that it most closely corresponds with or leave the category blank.

APPENDIX C: GRANTEE FEEDBACK FORM

The Annie E. Casey Foundation education program is continuing to develop and perfect its approach to performance measurement. As you go through the process of selecting, measuring, and reporting your performance results, please record your comments and ideas about this guidebook, the reporting requirements, and the general approach to performance measurement.

1. How helpful was this guidebook to your understanding and use of the performance measurement reporting template?

1	2	3	4	5
very helpful				not helpful at all

2. How helpful was this guidebook to your use of performance measurement to assess and improve your program?

1	2	3	4	5
very helpful				not helpful at all

3. How easy was the guidebook to understand?

1	2	3	4	5
very easy to understand				very confusing

4. How easy was it to use the performance measurement template?

1	2	3	4	5
very easy				very difficult

5. Is there anything that you think should be added to this guidebook?

6. Was there anything in this guidebook that you felt was confusing?

7. Is there anything you would like to change about the performance reporting template? What did you feel was the most helpful part of this guidebook? Do you have other comments or suggestions?

You can copy and return this feedback form to Bruno Manno at the Annie E. Casey Foundation.

Bruno V. Manno
The Annie E. Casey Foundation
701 St. Paul Street, Baltimore, MD 21202
email: BManno@aecf.org / fax: 410.986.3876

ENDNOTES

[1] Parts of this section are largely adapted or excerpted from "A Road to Results," available online: www.aecf.org.

[2] For more information about performance measurement systems, see Poister, Theodore, *Measuring Performance in Public and Nonprofit Organizations* (Jossey-Bass, 2003).

[3] Friedman, Mark, *A Guide to Developing and Using Performance Measures in Results-Based Budgeting,* The Finance Project, Washington D.C.: 1997; Friedman, *Trying Hard is Not Good Enough How to Produce Measurable Improvements for Customers and Communities* (Trafford Publishing, 2005).

[4] From Department of Health and Human Services, Health Resources and Services Administration, *Performance Review Protocol Guide: Principles and Implementation,* October 2005.

[5] Annie E. Casey Foundation, *A Practical Guide to Documenting Influence and Leverage in* Making Connections *Communities,* 2004. www.organizationalresearch.com/publications/aecf_influence_leverage_manual.pdf.

[6] This list of criteria for good performance measures comes from: Department of Health and Human Services, Health Resources and Services Administration, *Performance Review Protocol Guide: Principles and Implementation,* October 2005. ftp://ftp.hrsa.gov/performance review/protocolguide.pdf and University of Maryland School of Public Policy and Maryland State Department of Education, *A Guide for Results and Performance Accountability and Evaluation in Judy Center Partnerships,* 2003.

[7] The approach described in this section is derived from USAID Center for Development Information and Evaluation, *Performance Monitoring and Evaluation Tips,* 1996, http://pdf.dec.org/pdf_docs/PNABY226.pdf#search=%22performance%20targets%22.

[8] For a more detailed discussion of annual and long-term goals, see the Federal Enterprise Architecture Program Management Office, *How to Use the Performance Reference Model,* 2003, www.whitehouse.gov/omb/egov/documents/ How_to_PRM.PDF.

[9] For more information, see Roger E. Wenschlag, *The Role of Goal Setting and Performance Feedback in Achieving Peak Performance,* Vital Learning Corporation, Minneapolis, MN: 2006, www.vital-learning.com/documents/AffiliateLeadership.pdf; For a more detailed discussion of annual and long-term goals, see the Federal Enterprise Architecture Program Management Office, *How to Use the Performance Reference Model,* 2003, www.whitehouse.gov/omb/egov/documents/How_to_PRM.PDF.

[10] USAID Center for Development Information and Evaluation and the Federal Enterprise Architecture Program Management Office.

[11] Source: presentation by Casey education program.

[12] Source: "A Road to Results," available online: www.aecf.org.

[13] Poister, Theodore; *Measuring Performance in Public and Nonprofit Organizations* (Jossey-Bass, 2003) 112–120.

The Annie E. Casey Foundation

701 St. Paul Street
Baltimore, MD 21202
410.547.6600
410.547.6624 fax
www.aecf.org