DATA TRACKING: ALTERNATIVE METRICS

DEVELOPED FOR: **REDF**
Flying Whale Strategies
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PURPOSE

To identify metrics that represent our Employment Social Enterprise's' best work.

GLOSSARY

Validated Framework: A validated framework is a group of resources developed by a team of researchers which often includes:

- An evidence-based theoretical rationale for measuring something a certain way
- A set of tools to measure it

Metric: A data point.

Evaluation Plan: A structured roadmap that outlines how the organization will measure the effectiveness, impact, and quality of its programs and activities. It includes data collection

methods, timing, frequency, roles and responsibilities, and the process for learning from the data.

INTRODUCTION
Employment Social Enterprises are known for measuring a few standard metrics:
- Program retention rate
- Job placement rate
- Wage increase
- Personal growth
- Job readiness
- Reduction in recidivism

And yet ESEs are also largely founded by leaders who have bold and creative aspirations for the communities and individuals they serve. Examples:
- Reverse negative perceptions of youth in our community
- Activate the talent of immigrants resettled in our city
- Develop community leaders who were formerly incarcerated
- Incubate machinery entrepreneurs who launch household-name businesses

Leaders are often leery about tracking complex outcomes like these. And yet, we know the old adage, "what gets measured gets done" has truth. If ESEs begin to measure the categories of work that are important to them, they will achieve something more profound than a great job placement rate. This guide will help ESE leaders identify outcome metrics that are more representative of their specific vision for their work.

START HERE:
Step 1: Define your Vision
Use our logic model toolkit to identify your bold aspirational goal. The metrics you choose should help you arrive at this goal.

Step 2: Ask: Who are we aiming to change?
Identify the level of change that is most important to you. Is it individuals, the business community, the public? The metrics you choose will feature this level of focus. Some organizations say "all three" and thus they set one outcome goal for each level of focus: one for individual change, one for community change, and one for public change. Ensure that you are set up to achieve this change within your programs.

Step 3: Ask: What categories of change would really excite us?
ESEs are often measuring the least exciting metrics because anything else seems too complex. And yet, the profound change occurring is going unmeasured.

In order to choose categories of change that would excite you, first consider your ESE's unique talent and expertise and ask yourself: what are we achieving that nobody else pays attention to? It might be that you are brilliant at helping individuals uncover latent talent. It might be that

your participants return to serve and mentor others. It might be that you have a unique way of winning the good graces of diversion officers who refer others to your program.

Talent	Metric to Consider
Helping individuals uncover latent talent	An increase in the percentage of people we serve who discover and activate a latent talent.
Participants return to serve and mentor others	The percentage of the people we serve who return to mentor others.
Winning the good graces of diversion officers	An increase in the referral rate into our program.

Then ask: What do we want to excel at?
We have found that the organizations changing the landscape of their sector are clear on one or two things they want to excel at. They know, for example, that an increase in social capital is necessary for exiting poverty, so they choose to set a goal for an improvement in social capital. The metrics you choose to measure will signal your expertise. They will be a conversation-starter with folks interested in supporting your work that allow you to showcase your thinking and research.

Step 4: Consider your variables
ESE's can vary widely across a number of variables. It is important to analyze and be clear about your particular ESE design. This allows you to make decisions about what is most important to measure, and particularly, what your goals are. Every organization should be highly intentional with and dialogue about their variables, and get clear about what success means to them. There is no right or wrong. There are some core variables in ESE's that tend to be in relationship to one another. Understanding these may help level-set your expectations with metric setting.

> **Profit Margin:** Profit margin is one of the biggest variables that impacts the metrics you choose. ESE's can be on either end of the spectrum, earning very little profit to earning a large profit. Both can be defined as 'success,' depending on your model.
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> Some ESE's intentionally hire participant workers with little to no work experience to learn fundamental job skills. Their business exists in service of the program. Homeboy Industries calls these 'training businesses.' They are overstaffed with support positions, operate at a slower pace, and provide a high level of support. This is expensive. Therefore profitability is inherently challenging in this model.
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> Homeboy Industries also operates 'growth businesses' which hire participant workers who have been through previous programming. This work environment might be faster-paced, with a goal for profitability to re-invest back into the organization.

When choosing metrics, the 'training business' might focus outcome goals on stabilization and building transferable workplace skills, or increased learning outcomes. The 'growth business' might select economic mobility, multi-generational outcomes or wealth-generation as their metrics.

A few additional variables that impact metrics include:
Industry: Consider the profit margins for private sector industries. Some industries tend to align with certain outcome categories. For example, customer-facing, front-of-house retail and hospitality enterprises might provide opportunities for social capital outcomes. Back-of-House or warehouse enterprises may be more suited to focus on a participant worker's sense of safety and belonging.

Program Design: The length and intensity of the program should affect the type of metrics an ESE would select. An ESE with a ten-week internship would not select 'Economic Mobility' as a metric. There isn't enough time or intensity to genuinely move the needle on a participant increasing their economic position. A more appropriate metric might be that participants attain an industry-recognized certification. A related variable is whether the ESE hires participant workers into a permanent or transitional position.

Additional Variables to Consider:
- Ratio of participant to teacher / trainer / staff
- Size of cohort or staff
- Intensity of support / Employment Success Program
- Virtual vs In-Person

Step 5: Choose a proxy for a broad concept
We are often interested in measuring broad categories of change such as:
- Thriving
- Career Readiness
- Personal Growth

Our metrics have the power to communicate our expertise. If we choose to measure broad categories, we are signaling our inability to define success clearly. We should choose proxy measures that are proven to move the needle on a broad category. For example, we can conduct research on the factors necessary for our focus population to thrive in our city and choose metrics that move the needle on those factors. We can research the hard and soft skills needed for the career pathways our focus population are targeting and identify a scale of readiness for those careers.

Broad Category	Proxy Measures
Thriving	50% of the adults we serve report an increase in the quality & character of their relationships with their child.

Career Readiness	By 2026, 60% of the people we serve will attain an industry-recognized certification. By 2026, 60% of the people we serve will move into the "mature" phase of our career readiness scale.
Personal Growth	By 2026, 30% of families/individuals we serve will develop a six-month plan to avoid future crises. 95% of program participants will recreate themselves as measured by indicators of personal identity development.

You can describe the correlation between your proxy measure and your broad category of change as briefly as a few sentences or as in-depth as a white paper.

Case Study: Emma's Torch
The following is a narrative that Emma's Torch uses to describe the proxy measures they have chosen to measure financial autonomy and self-sufficiency:

> Our overarching goal with our Culinary Training Program is to support our students' financial autonomy and self-sufficiency by providing access to the job market and fostering their confidence to have full agency over their new lives in the United States. In 2025, we aim to serve 232 new individuals with our training programs in New York City and the DC area. This includes launching pilot programs to begin our expansion to our newest site in Inwood.
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> This goal of financial autonomy is measured in three key ways:
> 1. Wage Growth – Our goal is for our students' wage growth to be $31,000 more than their pre-enrollment salary. This wage growth has an immediate positive impact, enabling graduates to independently provide for themselves, whereas previously many of our students were reliant on support to meet their basic needs (housing, food, healthcare).
> 2. Job Placement Rate – With the assistance of our employment partners, we aim to place 90% of our graduates in upwardly mobile jobs where they can implement the skills they learned in our program to launch careers and set themselves on the path to financial independence.
> 3. Job Retention Rate – Following job placement we focus on job retention. We have a goal that 85% of our graduates placed in jobs will retain those positions for at least 6 months.
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> Each of these measurements allows us to ensure that our students are successful, not only in finding jobs but in building careers and increasing their earning power. Ultimately, we apply these statistics to Stanford's Measuring Mobility Framework which asks: "how do we measure mobility from poverty?"

Step 6: Review existing frameworks
A validated framework is a group of resources developed by a team of researchers which often includes:
- An evidence-based theoretical rationale for measuring something a certain way
- A set of tools to measure it

Examples of Validated Frameworks:

WORKFORCE BENCHMARKING NETWORK
The Corporation for a Skilled Workforce (CSW) utilized an advisory council to develop six workforce development metrics. They drew upon the Workforce Benchmarking Network (WBN) National Survey as well as data collected through focus groups.

MEASURING MOBILITY
US Partnership on Mobility from Poverty, Stanford, Urban Institute
Economic mobility is a three-fold effort which includes earning power, belonging in community, and power and autonomy. ESEs can identify their unique ability to move the needle on these three components of exiting poverty. The toolkit also includes measurement instruments that track changes on the three efforts.

The same team has created a list of metrics to help local leaders, researchers, and advocates measure the conditions that influence mobility from poverty in a community. Use these evidence-based predictors and metrics to assess current conditions, change policies and practices, and monitor progress toward increasing upward mobility and racial equity for all residents, especially those historically excluded from prosperity.

They also built a method for identifying baseline data for factors that impact economic mobility in your city.

EMPATH BRIDGE TO SELF-SUFFICIENCY
EMPath
The Bridge helps families plan, reach, and sustain their personal goals in five essential areas: family stability, well-being, education and training, financial management, and employment and career management.

LIFEWORKS SELF-SUFFICIENCY MATRIX
Lifeworks
Self-sufficiency requires 24 domains of growth. The matrix outlines each domain with indicators of change to be tracked for individuals.

HARVARD CENTER ON THE DEVELOPING CHILD
Building/Restoring Adult Competencies: Two Part Process: Environmental and Individual
Provides parameters that measure the impact your program is having on the systems a person is exposed to and the impact your program is having on individual

self-regulatory and executive functioning skills. ESE programs working with youth can integrate the specific parameters into their programming.

EMPATH AND HARVARD'S EXECUTIVE FUNCTIONING SKILLS
Using Brain Science to Design New Pathways Out of Poverty
Provides specific characteristics of three components to executive functioning skills. ESE programs can design interventions that rebuild these skills on the job: impulse control, working memory, mental flexibility.

THE EMPLOYMENT HOPE SCALE
Measuring an Empowerment Pathway to Employment Success
Captures the state of one's psychological empowerment, futuristic motivation, skills and resources, and goal-orientation as it relates to their job and career goals.

MOBILITY EXPERIENCES
Outlines 28 experiences that impact economic mobility. These occur across varied phases of life, from birth and childhood to adolescence and adulthood, and can be organized into six domains. Leaders can identify metrics that align with the findings from this research.

Within these validated frameworks, researchers often have identified measurement instruments. For example, the Measuring Mobility toolkit not only identifies the framework for exiting poverty: Earning Power, Belonging in Community, and Power and Autonomy, but also offers a series of validated measurement tools. Once you decide on a set of tools, your next step is to outline your plan for using those tools. The biggest decision is how you will calculate anything that is set up as a percentage in your goals.

See the Logic Model Toolkit for support in building an evaluation plan.

Step 7: Set a Goal
Your metric becomes a goal when you determine the extent to which it will change. If the goal is related to the quality of your work, it's called an outcome goal. Outcome goals are about transformational change.
Outcome Goals Should:
- Represent 2-5 years' time to complete. They are important and hard enough to require time.
- Describe the way lives, places, things are changed and transformed as a result of your best work.
- Be measurable, have a clear way of determining if the goal is complete.
- Serve as a compelling invitation to donors. It feels important and difficult to achieve.
- Be summative: they speak to the core contribution you're making to the field and, when held together, summarize your best work.
- Be aspirational: if met, the ESE will be at the cutting edge of their field.

APPENDIX: Example Alternative Metrics for ESEs

CATEGORY OF CHANGE	DEFINITION	EXAMPLE
Economic growth	Increase in measures of financial stability; earning power	- By (3 years from now), 85% of the individuals we serve will increase earning power. - By (3 years from now), 85% of the individuals we employ will demonstrate economic mobility. - By (3 years from now), 75% of participants take the next step into a chosen career pathway that inspires them. - By (3 years from now), 80% of participants will increase measures of socio-economic stability. - By (3 years from now), 85% of the individuals we serve will exit cycles of poverty. - By (3 years from now), x people in (region) and (region) experiencing crisis will experience a decrease in stress related to their crisis. - By (3 years from now), 30% of families/individuals we serve will develop a six-month plan to avoid future crises. - By (3 years from now), 50% of individuals will decrease reliance on/need for emergency services. - By (3 years from now), 80% of our participants will build an actionable career plan. - By (3 years from now), 60% of our participants will measure improvements in post-pandemic workskills. - By (3 years from now), 85% of our participants will report barriers to retaining employment have been removed.
Increased belonging	Increase experience of inclusion; increased social capital	85% of our employees will build their professional network. - By (3 years from now), 60% of immigrant communities' members report increased feelings of belonging and social capital. - By (3 years from now), 80% of our participants will increase social capital to support future job placement. - By (3 years from now), our participant's sense of safety and belonging will increase by 50%.
Healing	Psychological or whole person wellbeing is improved	50% of the adults we serve report an increase in the quality & character of their relationships with their child. 95% of program participants will recreate themselves measured by indicators of personal identity development. - By (3 years from now), 70% of individuals accessing direct services report improved whole person wellbeing. - By (3 years from now), 60% of the individuals we serve will measure improved health in their home environment. - By (3 years from now), 60% of the individuals we serve will repair at least one broken relationship in their personal life.

		● By 2026, 75% of apprentices will experience support for their individual racial identity development. ● By 2026, 75% of apprentices will connect racial identity development with an increased sense of power or liberation.
Executive Functioning	Increased critical thinking	● By (3 years from now), 75% of apprentices will repair/rebuild executive functioning skills impacted by chronic stress. ● 75% of apprentices will be able to reassess stressful situations and activate intentional self-regulation. ● 75% of apprentices will identify their own motivating goals which will override automatic responses. ● 75% of apprentices will demonstrate improved impulse control: be able to filter distractions, override impulses, maintain focus, pause and reflect before taking action, and maintain persistence in the face of worry or despair. ● 75% of apprentices will improve working memory: retain information from one place and connect it to information from another. ● 75% of apprentices will improve mental flexibility: multitask, adjust plans, re-establish priorities, apply different rules or social skills in different settings, translate between languages, alter strategies based on feedback, and innovate. ● By (3 years from now), 50% of the families/individuals we serve will report the ability to manage beyond the tyranny of the urgent.
Power and Autonomy	Improved sense of control over one's circumstances	● 80% of the individuals we serve will report increased power and autonomy. ● 70% of our employees will report an increased sense of autonomy over their future career plans. ● By (3 years from now), 60% of the families/individuals we serve will report increased autonomy in navigating systemic barriers within our community. ● By (3 years from now), 80% of those we serve will increase their capacity to aspire.
Career Readiness and Educational gains	Improved learning outcomes toward targeted educational frameworks	● By (3 years from now), 60% of the people we serve will attain an industry-recognized certification. ● By (3 years from now), 60% of the people we serve will move into the "mature" phase of our career readiness scale. ● By (3 years from now), our academic program generates a love of learning among 85% of the student body. ● By (3 years from now), 80% of our student body demonstrates growth mindsets. ● By (3 years from now), 80% of the families we serve will no longer report basic stabilization needs interfering with their children's education.
Changed behaviors	An intervention causes an	● 50% of the adults we serve report an increase in the quality & character of their relationships with their child.

	intended shift in daily routines; a disruption to a harmful status quo	90% of people who engaged in our programs completed a transformational act of leadership in their own life. 95% of program participants will recreate themselves measured by indicators of personal identity development. 68% of formerly incarcerated individuals completing our program will return to serve and mentor others. - By (3 years from now), 50% of the communities we serve become active participants in the solution to our climate crisis. 80% of the businesses we serve will create highly disability inclusive practices by (3 years from now).
Spiritual growth	Changes in spiritual wellbeing	By (3 years from now), 80% of inmates who participate in our programs will share/transmit hopeful purpose to their prison relationships as a result of their spiritual growth.
Public will building	Increases willingness of a group to act in support of an issue	- By (3 years from now), we will effectively shift the public narrative into three additional social sectors which will understand and value the talent of the formerly incarcerated workforce. - By (3 years from now), we will increase proximity between individuals impacted by incarceration and those untouched by the [criminal] legal system, resulting in 60% of stakeholders increasing positive perceptions. - By (3 years from now), our partners will report that they are 80% more likely to hire refugees. - By (3 years from now), 60% of Fresno neighborhoods report members engaging in community wealth building initiatives. - By (3 years from now), we will begin scaling our community engagement model to three similar communities.
Increased collaboration	Increased coordination of a single effort	- By (3 years from now), we measure a 40% decrease in Atlanta's recidivism rate. - We will provide decarceration programming in 10 additional prisons. - By (3 years from now), we will activate a model for refugee serving social enterprises which can be utilized across sectors. - By (3 years from now), we will see an increase of 50% of nonprofit ESEs and government agencies that have immigrant representation in leadership positions.

RESOURCES
Logic Model toolkit