

GetSET: Success in Extraordinary Times - Cohort 1 Year 1 Evaluation Findings and Recommendations

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January 21, 2014

Most of the first year of GetSET was used to establish a foundation for greater future change.
– Agency Executive

Background

GetSET (Get Success in Extraordinary Times) is a multi-foundation¹ initiative designed to help selected health, behavioral health and human services organizations in Western New York strengthen their operational infrastructure in order to ensure high quality, affordable services to the vulnerable populations they serve. Employing an organizational development philosophy and approach, GetSET is helping build the capacity of these organizations and their ability to respond to the changing service delivery and fiscal environment.

In late 2013, eight organizations were chosen (from nominations provided by the funding partners) to participate in GetSET's first cohort based on a "readiness" interview designed to identify agencies that had basic knowledge of the service environment, leadership support for change, and willingness to accept recommendations and consultant input. Organizational participation includes:

- Pairing with an organizational development (OD) consultant for two years;
- Implementation of a self-assessment gap-analysis (SAGA) at baseline, 12 and 24 months to assess the organizational strengths/weaknesses in eight core competency areas;
- Development and implementation of a capacity-building plan;
- Development/enhancement of the organization's value proposition(s);
- Limited grant funding to implement some of the capacity-building plan strategies;
- Group-based education sessions on relevant topics and issues; and
- Peer-learning sessions for GetSET organizational leaders and OD consultants.

Touchstone Consulting was hired to evaluate GetSET. The evaluation is designed to assess both the processes/activities that make up the GetSET intervention and the outcomes/impact of the intervention on the participating organizations. The evaluation goals include: 1) describing operational challenges and key elements of success; 2) measuring outcomes and the impact of the intervention; and 3) providing information for optimizing future cohorts of the GetSET program.

Introduction

As Cohort 1 enters its second and final year of GetSET, this report summarizes past evaluation findings and presents new information collected on participant progress towards outcomes at the end of their first year. This report describes what we have learned during the first year of GetSET, and offers recommendations for optimizing the GetSET intervention for the current and

¹ GetSET is funded by the Health Foundation for Western & Central New York, The John R. Oishei Foundation and The Peter and Elizabeth C. Tower Foundation

future cohorts. Recommendations are based on our review and integration of all of the information gathered, along with our professional experience and judgment.

Evaluation Activities

Touchstone's evaluation activities for the first year of GetSET (October 2013 – December 2014) included:

1. Regular telephone meetings with the GetSET Project Director
2. Development of a project logic model - including assumptions, strategies and desired outcomes (10.13)
3. Presentation of the evaluation plan during the first cohort project launch meeting (10.13)
4. Assessment (feedback questionnaires and analysis) of project start-up: initial GetSET activities, project launch and consultant orientation (10.13)
5. Baseline SAGA scoring and report development (11.13 - 2.14)
6. Creation of an evaluation domains working document (2.14)
7. Administration and analysis of a six-month feedback survey covering all aspects of GetSET (4.14)
8. An interim (six-month) evaluation report (5.14)
9. Review of organizational capacity building plans (5.14)
10. Assessment of the group education sessions (feedback questionnaires and analysis):
 - a. *Contracts, Negotiations & Consultants* (12.13)
 - b. *Building Capacity for Change* (6.14)
 - c. *Opportunities for Cash Flow Enhancement* (9.14)
 - d. *Developing a Value Proposition for Human Service Agencies* (10.14)
11. Participant interviews to learn what parts of GetSET are working best (7.17)
12. Analysis annual reports submitted by Cohort 1 agencies (12.14)
13. Year 1 SAGA scoring and reporting on changes over time (12.14)

Key Findings: Programmatic Strengths and Weaknesses

Overall, a look across evaluation results from the project's first year shows GetSET's core structure and processes to be well designed and well implemented. While opportunities for fine-tuning have been identified along the way, and will be discussed later in this report, GetSET will require only minor adjustments for future cohorts of participants.

In this section, we summarize findings that were presented in detail in prior reports: *Cohort 1 Interim Evaluation Report*, the *Report on GetSET Evaluation Interviews*, and the *Summary of Findings* for the various GetSET education sessions. The list covers the GetSET program's strengths and weaknesses revealed through the evaluation activities listed above.

GetSET's project management and design have received consistently high ratings over its first year. Participants appreciate the Project Director's strong and realistic leadership. Agency executives also like the consultant-based design of GetSET and the focus on Board engagement. While most of the participants like the implementation flexibility, some would also like clearer expectations in terms of timing, approach and content specifications for the major GetSET deliverables (organizational assessment, capacity building plan, value proposition).

Consultant orientation and the project launch sessions were well received overall. Mostly, participants indicated that the sessions were "worth their time" and provided information that would help them dive in to GetSET. Participants also offered specific

suggestions for improving these sessions in the future; suggestions included providing materials ahead of time, and allowing more discussion time.

Ratings of the first three educational sessions were mixed but the final session of the year was highly rated. Despite the difficulties inherent in designing an education session that meets the needs of GetSET's varied participants, the final session, *Development of a Value Proposition for Human Service Agency*, offered the immediately applicable information that participants indicated that they wanted in their feedback on the other sessions. The presenter, Heidi Milch, from Community Connections of New York (CCNY) was very well received by participants.

Participants like the idea of using a standardized tool for baseline and follow-up assessment, but they identified many problems with the SAGA designed for GetSET. Nearly all indicated a need to revise the content and processes for administering and reporting on the SAGA in order to increase its usefulness.

Overall, the organizational assessment (conducted by each consultant) was viewed positively, although the specific elements of the assessment varied across organizations. GetSET did not require a specific assessment method, so consultants approached it differently depending on their consulting style and understanding of the GetSET process.

The process for matching agencies with OD consultants was rated highly overall. A few specific suggestions were made by agencies and consultants to improve the process. Both agency executives and consultants wanted more time to consider the best match. Some agencies would have liked more guidance about the interview process, for example, what to look for in a consultant. A few consultants reported that they would have liked more involvement in the matching process, including giving their match preference and/or an explanation of the reason for the match.

All but one of OD consultant-agency executive working relationships functioned smoothly over the first year. Although there is significant variation in how the consultants and agencies are working together, almost all executives reported being pleased with their consultant's communication style, and rated them as effective. This suggests that the matching process is extremely important. In the case of the one problematic relationship, there appears to be personality differences as well as a gap in skills between the consultant and the executive

All participants find the peer networking sessions to be of great value and want much more. They like the camaraderie, validation and introduction to new approaches they experience through peer networking. To increase the effectiveness of these sessions, some participants recommended more time to problem-solve as a group. Also suggested was recapping any information about GetSET processes or deliverables that is discussed for the other group (consultant and executive sessions are held separately) to help maintain a shared understanding among all participants, to the extent it is appropriate and doesn't violate confidentiality.

Most agencies view their capacity building plan as a useful tool; however, the level of detail in the plans varies across agencies, as did the approaches to plan development. Some plans are based on previously identified agency priorities, others on the SAGA results, others on the value proposition work and still others on a combination of all three. In general, executives see them as useful for focusing attention on areas of need and keeping the agency on track.

Key Findings: Progress Toward Outcomes

The work to date has largely been focused on identifying the areas to target in our capacity building efforts and setting into motion the structures and plans to implement planned change. —Agency Executive

GetSET’s first year should be seen as a “rebuilding year” for the Cohort 1 agencies. It brought their organizational strengths and weaknesses to the surface and gave the agencies knowledge, tools and support to begin making the changes necessary to shape themselves into smarter, more efficient and higher-performing organizations. GetSET provided focus and a mechanism for creating this change and sparked a shift in organizational culture.

As of the Interim (six-month) Report, agencies had made little progress toward GetSET’s short- or longer-term outcomes (see sidebar). This was expected as even the short-term outcomes are targeted for a 2-year time frame. There was progress in that participant mindsets were shifting and the groundwork for future change was being laid at most GetSET agencies.

Examples include:

- Solid buy-in among agency leadership for the value of an OD approach toward capacity building.
- Agencies were starting to think differently about their operations and how to address issues. Some were starting to make basic changes in infrastructure (e.g., staffing, by-laws, marketing plan/approach).

An exception to the forward momentum of GetSET at the six-month point was the limited understanding, on the part of some agency executives, of the concept and purpose of the organizational value proposition.

GetSET Outcomes from Logic Model

Shorter-term Outcomes (Achieve during 2-yr project)	Longer-term Outcomes (Make progress during 2-yr project)
<ul style="list-style-type: none"> • Proficiency in defining specific “value proposition” • Expanded knowledge of OD • Development of capacity building plan focused on longer term outcomes • Changes in SAGA scores • Changes in operational structures and/or processes 	<ul style="list-style-type: none"> • Business models that are more financially viable, adaptable and sustainable • Measurable improvements in efficiency, quality of care, and/or outcomes of care

Year 1 Progress

We anticipate increased application of the capacity building plan during the second year and beyond. At this point, most of the first year was used to establish the foundation for these changes. —Agency Executive

At the end of the first year, more organizational change is occurring within GetSET’s first cohort, and progress toward outcomes is more evident. Although, most of the changes that have occurred are more foundational in nature, they are setting the stage for building future capacity.

GetSET agencies report that GetSET has had more than moderate impact (7.1 on a scale of 1 to 10) on their organizations in its first year. Their explanations for GetSET’s impact on their agencies fall into four general categories:

- Provided the focus and a mechanism to create change;
- Sparked a shift in knowledge, mindset and culture;
- Catalyzed infrastructure changes needed for future capacity building efforts (e.g., staffing changes, communication improvements); and
- Strengthened organizational leadership (e.g., highlighted leadership issues, required more cohesion, new ways of thinking, operation at more strategic level).

All Cohort 1 organizations saw improvements in one or more areas of their SAGA scores (Table 1). With the most room for growth, organizations with lower baseline scores generally showed more improvement in their scores. Across participating agencies, the areas that saw the greatest increases in SAGA scores align with the focus of GetSET efforts:

- Organizational infrastructure;
- Communication and branding;
- Data-driven decision-making; and
- Environmental dynamics.

Table 1: Overview of Changes in SAGA Scores

Note: + = Increase; -- = Decrease; +* = Change of 1.0 or greater; Shading = Increased/Decreased across all respondents (Board, staff, OD consultant)

SAGA Sections	Agencies								Total Change (all agencies)
	1	2	3	4	5	6	7	8	
Section 1: Mission and Values	+	+*	--	+	--	--	+	+	1.80
Section 2: Governance	+	+	+	+*	--	--	--	+	1.74
Section 3: Environmental Dynamics	+*	+	+	+	+*	--	--	+	4.50
Section 4: Leadership	--	+	+	+*	+	+	+	+	3.00
Section 5: Organizational Infrastructure	+	+	+*	+*	+	+*	--	+*	6.38
Section 6: Communication and Branding	+*	--	+	+*	+*	--	--	+*	6.13
Section 7: Data-driven Decision-Making and Planning	+*	--	+	+*	+	+	--	+*	4.80
Total Composite Score									
2013	45.84	45.90	44.30	41.87	54.63	51.12	59.53	46.52	
2014	52.61	48.19	48.38	50.57	56.51	50.82	58.46	52.51	
Total Change	6.77	2.29	4.07	8.70	1.88	-0.30	-1.07	5.99	

While the degree of change varies, organizational change is starting to happen across all Cohort 1 agencies. Looking across four primary areas of organizational life, the most common changes noted by participants fall into a handful of areas that could be considered precursors to greater capacity building (Table 2).

GetSET has become a part of the language and culture. It is already becoming integrated into work and culture. Everyone feels a part of the GetSET changes.
—Agency Executive

Table 2: Cohort 1 Outputs and Outcomes

Area of Organizational Life	Changes Described by Participating Agencies
<p>External relationships –The organizations’ interaction with the outside world, including organizational survival.</p>	<p>Top mentions:</p> <ul style="list-style-type: none"> • Pursuing/established more strategic collaborations • Value proposition is in development/is developed <p>Also mentioned:</p> <ul style="list-style-type: none"> • Adjusting marketing strategies • Working with managed care organizations
<p>Leadership – How overall direction of the organization is determined, how senior leadership and the board guide the organization.</p>	<p>Top mentions:</p> <ul style="list-style-type: none"> • Strengthened leadership (through training, role clarification, restructuring, hiring) • Increased Board engagement and activity
<p>Internal structure – Basic shape of the organization, internal communication and work style.</p>	<p>Top mentions:</p> <ul style="list-style-type: none"> • Increased collaboration and communication within and across programs and among and between leadership and staff (through incentives, new systems/processes, new communication standards, regular meetings, improved phone/email systems) <p>Also mentioned:</p> <ul style="list-style-type: none"> • Restructuring organization/roles • Regular staff education and training
<p>Internal management systems – Mechanisms used to manage the organizations ability to do what they do.</p>	<p>Top mentions:</p> <ul style="list-style-type: none"> • Identifying new system needs • Putting new systems in place (e.g., project mgt., accounting, financial management) <p>Also mentioned:</p> <ul style="list-style-type: none"> • Upgrading technology (or preparing for technology assessment) • Improving data collection/reporting systems • Identifying performance metrics/dashboard for decision-making

More than half of Cohort 1 continues to report limited understanding of the concept and purpose of the value proposition, and note better understanding among leadership.

Agency executives explained that those directly involved understand the concept and purpose well. Staff who are less involved with the development of the value proposition have some awareness but limited understanding. For at least a few agencies, rollout of the value proposition for staff input is slated for the coming year. While it is clear that the agencies have embraced the value proposition as a project deliverable, how this work has been integrated into the rest of their GetSET activities, like the capacity building plan, varies from organization to organization.

I am hearing discussion about value propositions, outcome measures and how to build the capacity of the agency. Prior to GetSET this did not occur as much. —Agency Executive

Factors Impacting Progress

GetSET has helped us focus our thinking and action as a leadership team and helped bring the Board's focus together with that of leadership. —Agency Executive

As with all initiatives requiring organizational change, GetSET agencies have experienced some facilitators and barriers in moving forward with their capacity building work.

Agencies identified three primary factors that have helped them in their capacity building efforts. (We specifically asked them to exclude mention of their OD consultant, which previous feedback identified as very helpful.):

1. *GetSET came at the right time and offers a clear path forward*—Agencies were feeling a sense of urgency to change given the changing service delivery and fiscal environment, but were not sure how to address it. The capacity building plan is providing a structure for capturing goals and establishing timelines for change.
2. *Greater engagement at the leadership level and by the Board*—The development and execution of the capacity building plan has required greater involvement and focus by leadership teams and Boards. In some cases, new leadership has been put in place and in other cases, leaders have had to stretch to meet the demands of the project.
3. *Engagement and education of staff*—Agencies appear to be split in terms of their activities in this area. Those involving a broader cross-section of staff in GetSET report that it is helpful for moving the project forward.

There were also a number of factors identified by agencies as impeding or holding up their GetSET-related work:

1. *Competing priorities*—Not surprisingly competing work priorities and urgent work distractions were mentioned most often as barriers to progress.
2. *Staff changes and response*—This includes turnover in leadership, staff reductions and emotional reactions to change.
3. *Lack of expertise in areas of needed change*—Expertise in technology, data analysis, Medicaid managed care, and working with outside vendors were noted by some agencies as areas where a lack of knowledge and experience are impeding change.
4. *Insufficient management systems*—Some agencies also reported not having the systems, data or reporting tools to propel their capacity building work forward.
5. *Implementation issues*—A few agencies dealt/are dealing with issues around understanding the expectations of GetSET, translation of the conceptual framework of the value proposition into something agencies can use and how to involve a broader cross-section of staff in the GetSET effort.

In addition, GetSET's Cohort 1 report broader challenges that affect how they progress through the project. Top organization-wide challenges reported by agencies in year one include:

1. Funding/payments (grant dependency, lack of diversification, restricted dollars, low/unreliable reimbursement);
2. Understanding the shifting delivery and fiscal environment;

3. Marketing (branding, visibility, differentiation, targeting);
4. No or limited data collection, analysis or metrics to help with strategic planning and decision-making;
5. Staffing (recruiting, retaining, dealing with mismatched skill set); and
6. Inadequate IT (hardware, software, staff training).

Not surprisingly, there is a lot of overlap between the factors agencies identified as impeding their GetSET work and what they view as their top organizational challenges. Most of these challenges are the very areas that GetSET is designed to impact. Of course, significant organizational turnaround in these areas will likely take longer than the two-year GetSET time frame.

Agency Executive Comments:

Other priorities with regular job responsibilities limit time available for capacity building initiatives. For example, outside surveys/audits, investigations, union negotiations, scheduling meetings/events around Board schedules.

People understand and agree in the GetSET meetings, but have a challenging time putting the concepts and tools to work, like the value proposition.

Conclusion and Recommendations

Overall, GetSET has had a successful first year with relatively minor operational challenges. The agencies and the consultants are well matched, engaged, and working together well. The SAGA served as a good starting point, although changes are needed to improve this tool for future participants. Organizational assessments were conducted and capacity building plans are in place for all Cohort 1 agencies. All involved report that the project is well managed. And, most importantly, agencies are also starting to change how they think and how they work within the changing service delivery and fiscal environment. For GetSET's second and final year, agencies will need to focus on putting the GetSET concepts and tools to work, finalizing their value proposition, continuing with the implementation of their capacity building plans and overcoming the challenges that are impeding their progress.

Over the first year, a number of opportunities for project optimization were identified. In the spirit of quality improvement, many of these were communicated to GetSET's Project Director and changes have been made or are in progress (Table 3). Detailed descriptions of most of the recommendations can be found in the *Cohort 1 Interim Evaluation Report*, the *Report on GetSET Evaluation Interviews*, and the *Summary of Findings* for the various GetSET education sessions.

Table 3: Recommendations for Project Optimization

Recommendations	Status
Transparency —Make consultants aware of the findings in the interim report to highlight both the success of their efforts, and the agency confusion around the value proposition.	Complete
GetSET Expectations —Make even clearer (in writing and regularly reiterate) what participants must do, by what dates, and provide directly applicable examples/templates/checklists (depending on what is most appropriate) for GetSET’s major deliverables (organizational assessment, capacity building plan, value proposition). Provide more clarity on when and where agencies and consultants can improvise. Provide any feedback on deliverables to both the agency executive and the consultant to ensure a shared understanding of needed revisions.	Changes planned for Cohort 2
Consultant/Agency Matching —Revise the process for matching consultants and agencies to provide more time for agencies to interview the participants, more structure for the interviewing process, and a greater opportunity for consultants to indicate their pairing preferences.	Communicated to Project Director
SAGA —Continue to use the original SAGA for Cohort 1 to track change over time; review and revise for Cohort 2, or adopt a new validated assessment tool.	Complete (SAGA has been revised for Cohort 2)
Education Sessions —Format education sessions to be as interactive as possible and feature information that is immediately applicable.	Ongoing
Capacity-building Plans —Provide more explanation and connection between the vision of GetSET (preparing for the future), the value proposition (business statement identifying and organization’s value), and the focus of the capacity building plans (optimizing organizational efficiency).	Planned for Cohort 2 launch session
Peer Networking —Bring participants together earlier and set up regular peer networking sessions that include opportunities to brainstorm and discuss approaches to GetSET’s main deliverables, as well as common areas of capacity building. Encourage consultants to share specific expertise with other agencies and consultants.	Sessions will be held within the first 4 months for Cohort 2
Value Proposition Training —Offer the value proposition training provided by CCNY earlier in the GetSET timeline.	Included in Cohort 2 launch session; workshop planned within first six months
Capacity Building Funds —Provide more clarity around how the capacity building funds can and should be used.	Included in next peer learning session for Cohort 1; workshop planned mid-way through the first year for Cohort 2
Agency Grouping — Group agencies by service delivery type to allow more targeted GetSET discussions and support. Mixing health, behavioral health, and human services organizations sometimes made it difficult to address the specific issues facing each type of organization.	Under consideration for future cohorts

Questions for Further Investigation

One year in, we have a good understanding of GetSET's programmatic strengths and weaknesses and the organizational changes that are starting to occur. What we do not have is a clear understanding about which GetSET project activities and/or requirements are having the most impact on the capacity of Cohort 1 agencies, or if it is the combination of different kinds of support activities that works best. We will ask agencies this question as part of their final GetSET reporting requirement at the end of the second year, and hope to shine a brighter light on some of the key factors of GetSET's success.