Peer Data Webinar Series
A Web of Data Management Systems:
What if your spreadsheets talked to each other?

12/3/2024

Peer Presenter:
Keenan Woods, Ph.D.
Director of Performance Management
United Planning Organization

The Promise Of Community Action

Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

A Web of Data Management Systems: What if your spreadsheets talked to each other?



By: Keenan Woods, Ph.D.

UPO | UNITING PEOPLE WITH OPPORTUNITIES

ABOUT UPO: WE ARE POVERTY-FIGHTERS

- Private nonprofit human service corporation
- Established on December 10, 1962
- Established via gifts from both Ford and Meyer Foundation grants
- Become the designated community action agency for Washington, DC in 1964
- Mission: Uniting People with Opportunities
- Operating budget in FY 2022 ~ $42M

UPO | UNITING PEOPLE WITH OPPORTUNITIES

ABOUT UPO: THE NUMBERS

- Private nonprofit human service corporation
- Customers Served in FY 2022 ~ 52,000+
- Staff ~ 440+
- Program Locations ~ 22
- CSBG Funded Service Providers ~ 8
- Headstart Centers ~ 17
- Headstart Home Visitors ~ 7
- Volunteers Engaged ~ 1,000+
- Partnerships ~ 600+
- Certified ROMA Professionals ~ 2

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UPO'S AGENCY-WIDE SCORECARD (AWSC)

AGENCY SCORECARD

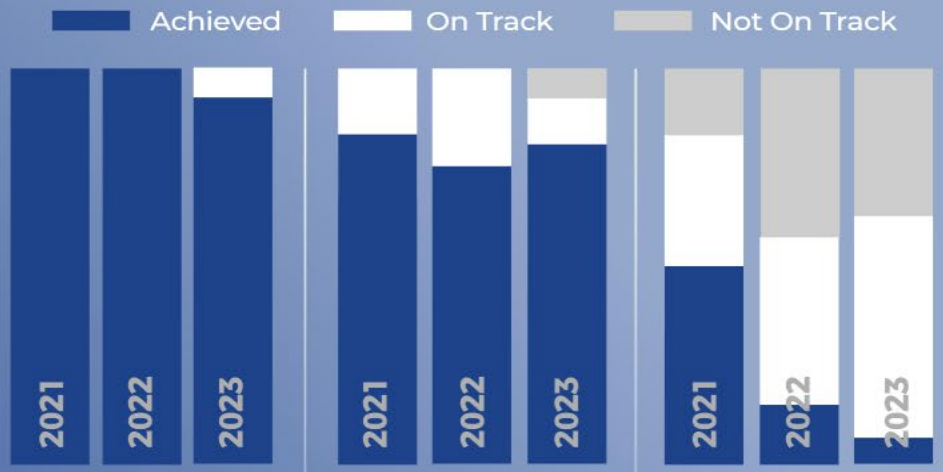
CATEGORY	PERFORMANCE	WEIGHT
Organizational Standards	84%	5%
Agency Strategic Plan	83%	5%
Financial Strength	84%	5%
ROMA / Programmatic Outcomes / Customer Self-Sufficiency	75%	70%
Customer / Staff Input	88%	5%
Program and Administrative Monitoring	63%	5%
Capacity Building & Governance	74%	5%

AGENCY SCORE **76%**

The goal is to attain 85% or more at the end of the fiscal year. Staffing challenges in the post-Covid economy severely affected our performance.

For more information on our innovative scorecard, visit upo.org/scorecard or scan the QR code.

MEASURING AGENCY RESULTS



Assisted: The number of customers UPO helped compared to the number of customers who sought help.

Stabilized: The number of customers now stabilized compared to the number of customers who sought help.

Beyond Stable: The number of customers achieving or exceeding stability* compared to the number of customers who sought help.

Unduplicated Customer Count

2021: **58,120** | 2022: **52,569** | 2023: **52,852**

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UPO'S AGENCY-WIDE SCORECARD (AWSC)

SCORECARD

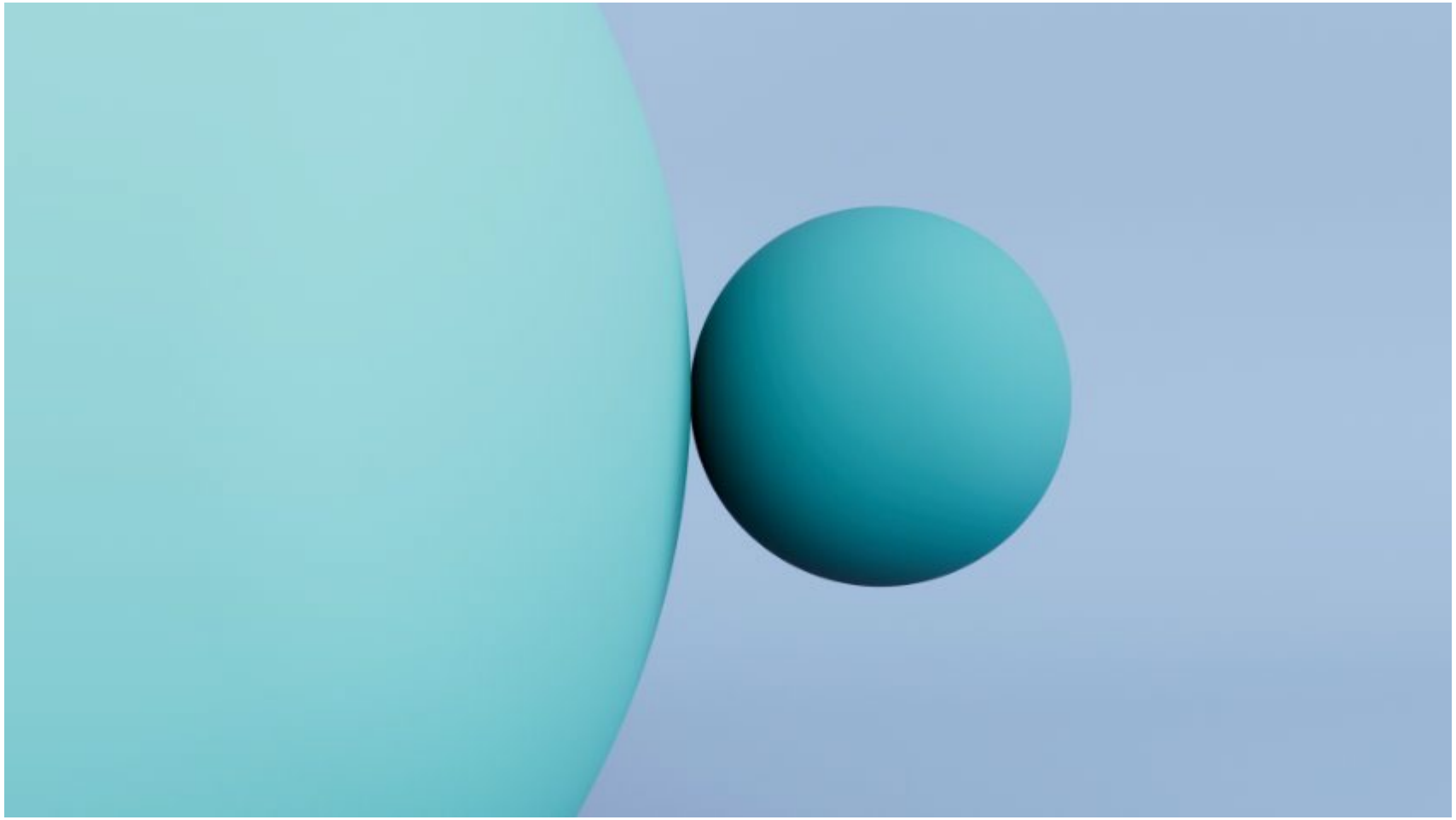
CATEGORY	PERFORMANCE	WEIGHT
Organizational Standards	86%	5%
Agency Strategic Plan	83%	5%
Financial Strength	99%	5%
ROMA / Programmatic Outcomes / Customer Self-Sufficiency	82%	70%
Customer / Staff Input	57%	5%
Program and Administrative Monitoring	48%	5%
Capacity Building & Governance	74%	5%

AGENCY SCORE 80%

(The goal is to attain 85% or more at the end of the fiscal year. Due to COVID19, UPO's operations were severely impacted in fiscal year 2022)

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UPO'S AWSC SATISFACTION SURVEY



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SATISFACTION SURVEY

Recent | My forms | Filled forms | Shared with me | Favorites

Filter by keyword

Issue Log - FY 23
Office of Performance Managment
0 responses

2025 Customer Satisfaction Survey
Keenan Woods
50 responses

UPO 2024 EMPLOYEE SATISFACTION SURVEY
Keenan Woods
47 responses

2024 Customer Satisfaction Survey
Keenan Woods
354 responses



2024 Volunteer Satisfaction Survey
Keenan Woods
36 responses

2024 Board of Directors Satisfaction Survey
Keenan Woods
10 responses

2024 Partner Satisfaction Survey
Keenan Woods
51 responses



2024 Administrative Service Delivery Survey (Semi-Annual Employee Survey)
Keenan Woods
45 responses

2025 Partner Satisfaction Survey
Keenan Woods
0 responses

UPO 2025 Employee Satisfaction Survey
Keenan Woods
0 responses



2025 Administrative Service Delivery Survey (Semi-Annual Employee Survey)
Keenan Woods
0 responses



2025 Volunteer Satisfaction Survey
Keenan Woods
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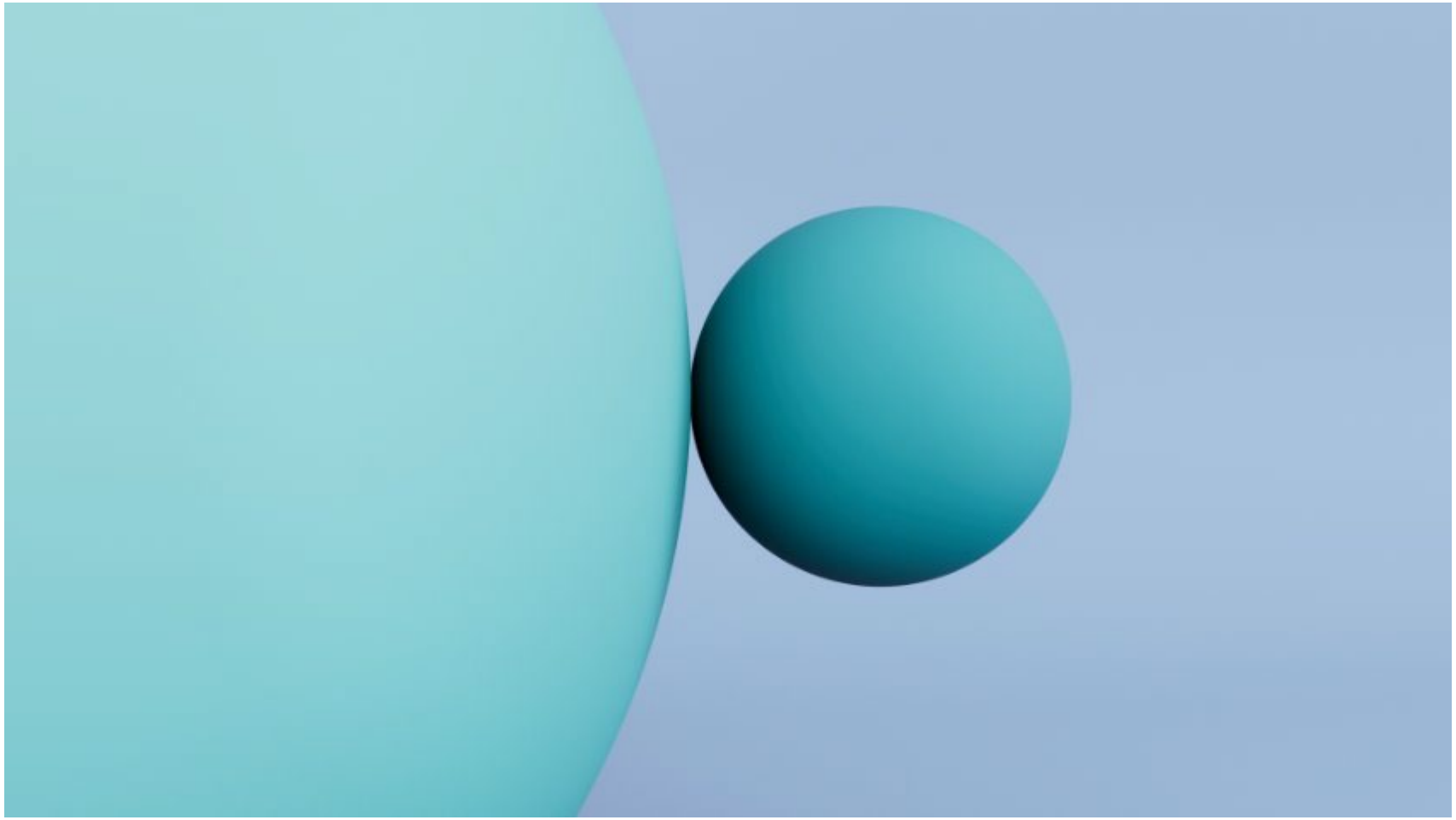
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AGGREGATE SURVEY SATISFACTION SCORE



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UPO'S AWSC STRATEGIC PLAN



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INDIVIDUAL STRATEGIC PLAN TRACKING PAGE

Goal	Status
UPO Goal 1: Optimize Economic Security Programming(Provide high quality results-oriented programs and services to DC residents who aim to achieve economic security)	49%

Objective	Status
Objective 1: Evaluate the effectiveness of at least 80% of divisions current service offerings to guide the improvement, dissolution or expansion of programs and services in three (3) years.	75%

Strategy	Status
Strategy 1: OPM will conduct an effectiveness evaluation on at least 80% of programmatic divisions using current UPO data and processes documents.	54%

Tatics	Description of Evidence	Expected Completion Date	Status	Evidence Collected By Monitor	Completion Fiscal Year	Challenge	Comments
Tactic 1: Review programs logic model, curriculum, grant/funder requirements, and mission statement to understand the fundamental framework of each program.	Folder of reference material for programs logic model	09/31/2024	Complete With Evidience	Yes	10/4/2024	High	gather what I already have access too and request what I dont.
Tactic 2: Crosswalk programs KPI's versus industry standard KPI's, to ensure that the most effective indicators are selected and tracked through out the fiscal year.	OPM Monitors send email confirm of completed cross walk of reference material	09/31/2024	Complete With Evidience	Yes	10/4/2024	Medium	Have the monitors review when all of the documents are collected
Tactic 3: Review current community needs assessment, current community action plan, previous annual performance reports, and performance of local agencies offering similar services to create a best estimation of excepted annual services and outcomes.	Folder of completed logic models for each program	09/31/2024	Complete With Evidience	Yes	10/4/2024	Low	The logic model as a expected outcome/service number based on previous data.
Tactic 4: Evaluate each KPI with qualitative and quantitative data quarterly on a performance spectrum including (under performing, under estimated, on target, over estimated, over performing).	Add performance spectrum metric for each kpi in PMR	09/31/2026	Not Started/Delayed			High	pin down some consistency in the ratings. This will take a year to create the system, a year to test run it and then the following year run the polished product

OPM | OPM Summary

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INDIVIDUAL STRATEGIC PLAN SUMMARY

UPO	Division Tactical Plan Progress	
OPM	19%	
Goal		**Narratives**
UPO Goal 1: Optimize Economic Security Programming (Provide high quality results-oriented programs and services to DC residents who aim to achieve economic security)	29%	
UPO Goal 2: Prioritize People-Centered Efficiency and Effectiveness (Optimize Organizational Performance through Staff Capacity Development and Business Process Improvements)	5%	

Goal Progress by Tactic Completion

Progress	Goal 1	Goal 2	Goal 3	Total
Not Started/Delayed	56%	79%	N/A	62%
In Progress	19%	21%	N/A	19%
Complete Without Evidence	0%	0%	N/A	0%
Complete With Evidience	25%	0%	N/A	17%

Tactic Completed by Fiscal Year

Fiscal Year	Tactics Due	Tactics Completed	Percentage Tactics Compelted
FY - 24	14	5	36%
FY - 25	24	2	8%
FY - 26	3	0	0%
Total	41	7	17%

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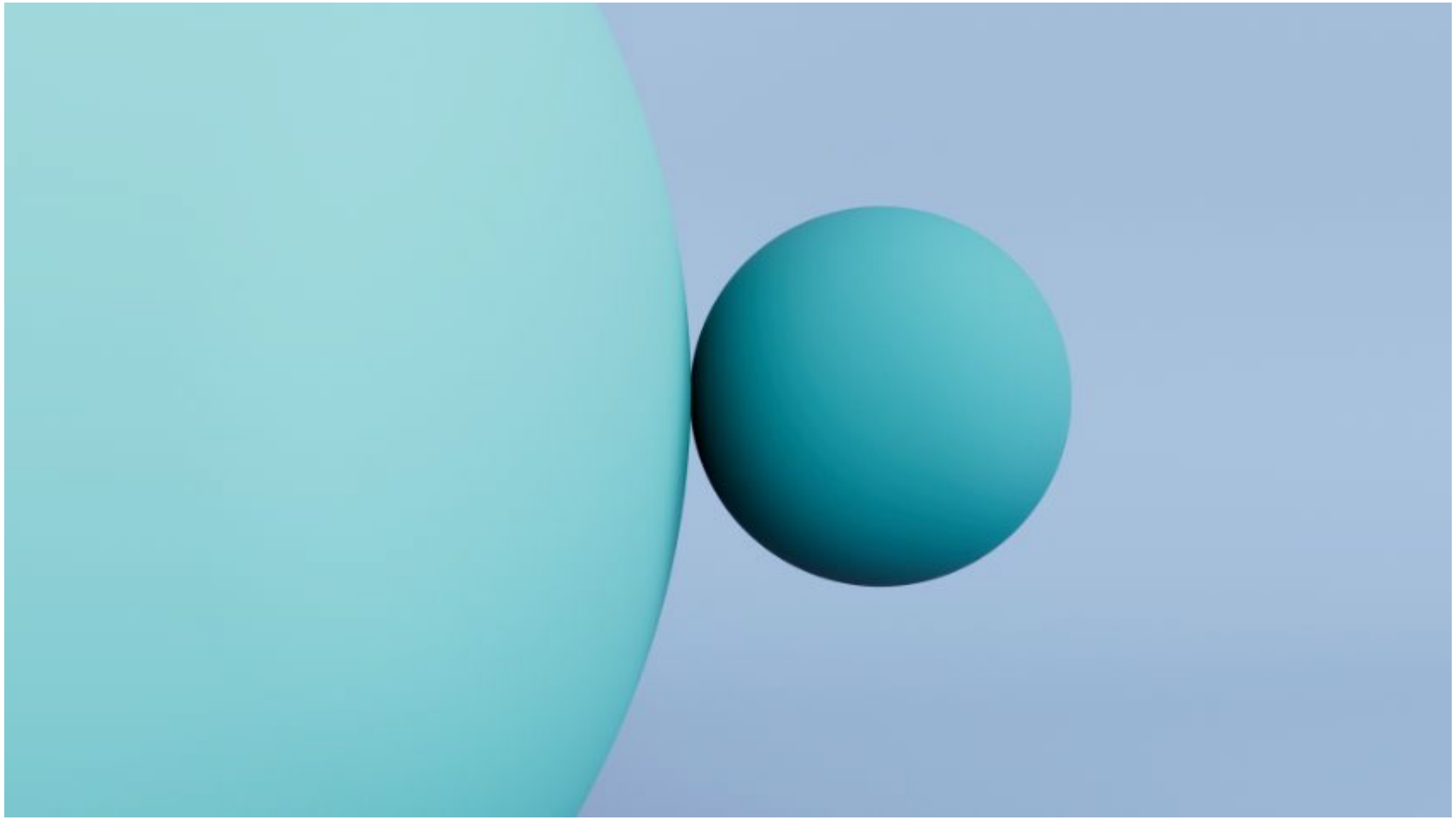
INDIVIDUAL STRATEGIC PLAN SUMMARY

	A	B	C	D	E	F
1	UPO		Division Tactical Plan Progress			
2	OPM		30%			
3	Goal					
4	UPO Goal 1: Optimize Economic Security Programming (Provide high quality results-oriented programs and services to DC residents who aim to achieve economic security)		49%			
5	UPO Goal 2: Prioritize People-Centered Efficiency and Effectiveness (Optimize Organizational Performance through Staff Capacity Development and Business Process Improvements)		5%			
6	Goal Progress by Tactic Completion					
7	Progress	Goal 1	Goal 2	Goal 3	Total	
8	Not Started/Delayed	41%	79%	N/A	52%	
9	In Progress	11%	21%	N/A	14%	
10	Complete Without Evidence	0%	0%	N/A	0%	
11	Complete With Evidience	46%	0%	N/A	31%	
12	Tactic Completed by Fiscal Year					
13	Fiscal Year	Tactics Due	Tactics Completed	Percentage Tactics Completed		
14	FY - 24	14	11	79%		
15	FY - 25	24	2	8%		
16	FY - 26	3	0	0%		
17	Total	41	13	32%		
18						
19						

OPM | OPM Summary

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UPO'S AWSC INTERNAL MONITORING



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PERFORMANCE MANAGEMENT REPORT

OFFICE OF

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PERFORMANCE MANAGEMENT



Report Title:	FY23 Fourth Quarter Monitoring Report
Review Period:	July 1, 2023 – Sep 30, 2023
Division:	Workforce Institute Division
Program:	Placement
Reviewer:	Ahmad Farhan, Monitoring and Evaluation Analyst II Office of Performance Management (OPM)
Review Date:	11/30/23
Report Date:	12/12/23

CFC #90524 | DC One Fund Campaign #9881 | United Way NCA #9881
www.upo.org

Division: Workforce Institute
Job Readiness Coach: Lyndriell Smith lsmith@upo.org
2907 Martin Luther King Jr Ave SE,
Washington, DC 20032

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ISSUE LOG

Critical Issue Log	FY 23	UNITING PEOPLE WITH OPPORTUNITIES		# of Issues	# of Issues Resolved	% of Issues Resolved
Office of Resrouce Development	Excutive Supervisor	Daniel		3	3	100%
A. Farhan						

Report Date	Issue Type	Detail	Evidence of Resolution	Issue Resoved	Evidence Confirmed by Monitor	Date Resolved	45 Day Follow-Up Period	90 Day Follow-Up Period	180 Day Follow-Up Period	45 Day Follow-up Date	90 Day Follow-up Date	180 Day Follow-up Date	180 Day Follow up Notes
9/1/2023	Finding	There are no internal controls on paper, indicating a need for documented processes and procedures.	NA	Yes	Yes	10/23/2023	Closed	Closed	Closed	10/16/2023	11/30/2023	1/14/2024	The revised SOP and process map indicates the different steps of internal control.
9/1/2023	Finding	No monitoring plan is in place for awarded grants, indicating a potential lack of oversight and accountability.	NA	Yes	Yes	10/23/2023	Closed	Closed	Closed	10/16/2023	11/30/2023	1/14/2024	The revised SOP provides details on the monitoring mechanism and role of R&D.
9/1/2023	Finding	The SOP needs revision as it needs more clarity about the timeline or deadlines for each step in the grant generation process. Additionally, the SOP provides limited information on post-award management and clarity on the roles and responsibilities of the stakeholders involved.	Grants SOP and Process Map	Yes	Yes	4/4/2024	Closed	Closed	Closed	10/16/2023	11/30/2023	1/14/2024	A revised detailed SOP along with the process map has been shared with OPM. The OPM is currently reviewing the draft and should finalize it soon.
							Closed	Closed	Closed	2/14/1900	3/30/1900	5/14/1900	

Was issue resolved?

If Yes: What steps were taken to resolve issue & was evidence provided

If No: What are the barieers to completion and next steps.

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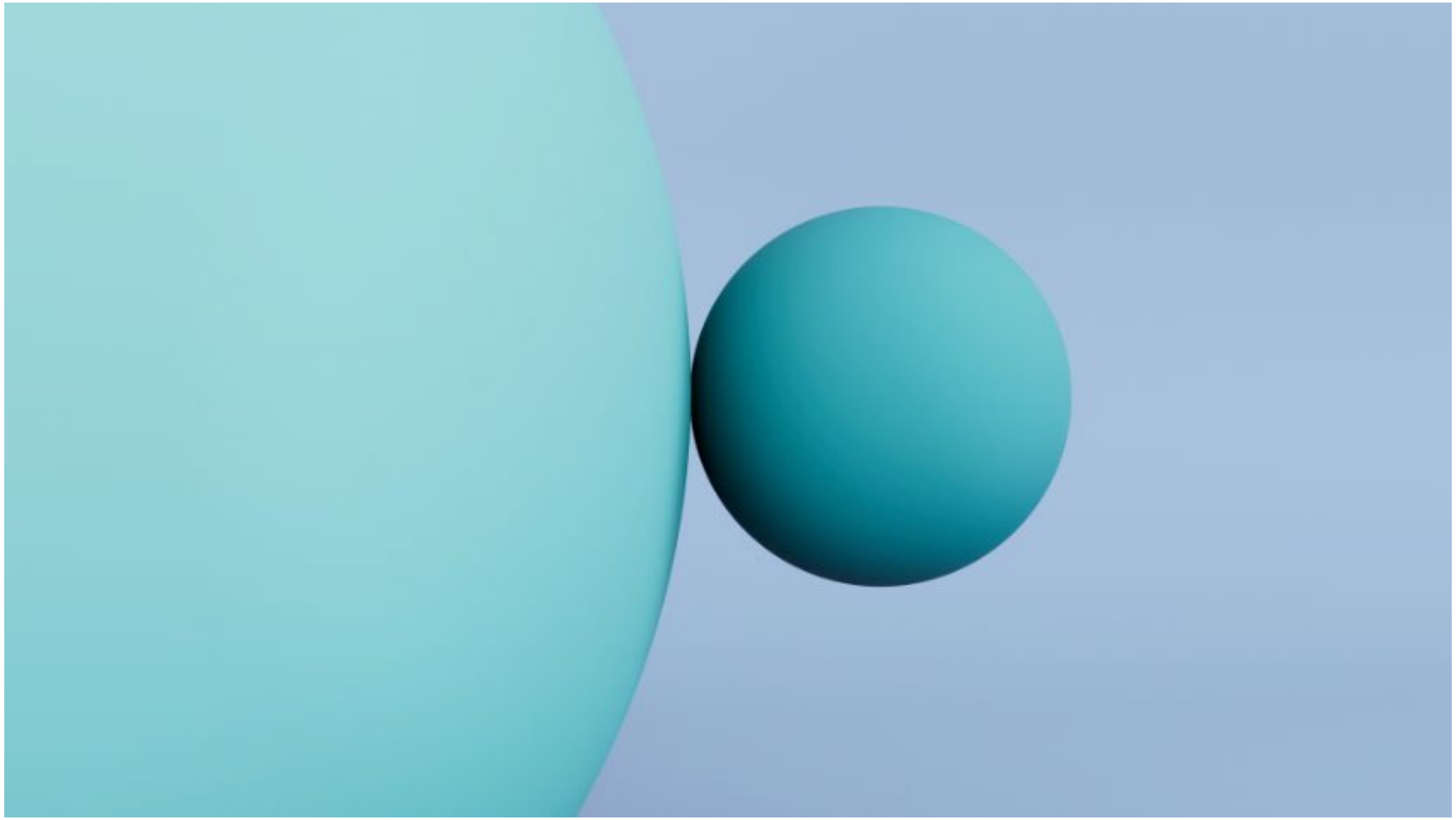
MONITORING CHECKLIST

	A	B	C	D
1	**Monitoring Domain**	**Actual Total**	**Expected Total**	**Performance**
2	Monitoring Report	8	24	33%
3	PMR	15	72	21%
4	Strategic Plan	0	9	0%
5	Comment Box	3	12	25%
6	Issue Log	2	12	17%
7	Total	28	129	**22%**

Monitoring | Issue Log | Performance Summary | +

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UPO'S AWSC FINANCIAL STRENGTH



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FINANCE SECTION OF ORGANIZATIONAL STANDARDS

33%	Standard Numb	Standard Description	Standard Category+B:	Shelf Life	Description of Evidence	Office to Contact	Assignmer	Status	Completed Dat	Date Updated	Exp Dat	Standi
	8.10	The fiscal policies have been reviewed by staff within the past 2 years, updated as necessary, with changes approved by the governing board.	Financial Management	2	-Fiscal policy -BOD approve fiscal policy		PM	Yes	2/9/2022	8/8/2022	2/9/2024	Not Good
	8.08	All required filings and payments related to payroll withholdings are completed on time.	Financial Management	1	Financial document 941 Payroll Withholdings	Office of Finance; Charles	KW	Yes	2/5/2023	4/14/2023	2/5/2024	Not Good
	8.01	The organization's annual audit (or audited financial statements) is completed by a Certified Public Accountant on time in accordance with Title 2 of the Code of Federal Regulations, Uniform Administrative Requirements, Cost Principles, and Audit Requirement (if applicable) and/or State audit threshold requirements.	Financial Management	1	-Annual audit or -Financial statements	Office of Finance	KW	Pending	8/31/2022	9/2/2023	8/31/2023	Not Good
	8.02	All findings from the prior year's annual audit have been assessed by the organization and addressed where the governing board has deemed it appropriate.	Financial Management	1	-previous FY2020 Annual audit or -Financial statements -BOD meeting addressing critiques	Office of Finance	PM	Pending	10/31/2021	9/2/2023	10/31/2022	Not Good
	8.03	The organization's auditor presents the audit to the governing board.	Financial Management	1	-Audit presented at BOD	Office of Finance	PM	Pending	2/9/2022	9/2/2023	2/9/2023	Not Good
	8.04	The governing board formally receives and accepts the audit.	Financial Management	1	-Audit accepted by BOD	Office of Finance	PM	Pending	2/9/2022	9/2/2023	2/9/2023	Not Good
	8.05	The organization has solicited bids for its audit within the past 5 years.	Financial Management	5	-RFP for Auditing Services -Purchasing systems policy	Office of Finance	KW	Pending	7/23/2018	9/2/2023	7/22/2023	Not Good
	8.06	The IRS Form 990 is completed annually and made available to the governing board for review.	Financial Management	1	-IRS Form 990 -Board minutes	Office of Finance	KW	Pending	8/31/2022	9/2/2023	8/31/2023	Not Good
	8.07	The governing board receives financial reports at each regular meeting that include the following: 1. Organization-wide report on revenue and expenditures that compares budget to actual, categorized by program; and 2. Balance sheet/statement of financial position.	Financial Management	1	-All BOD meeting agendas		PM	Yes	1/19/2023	4/14/2023	1/19/2024	Not Good
	8.09	The governing board annually approves an organization-wide budget.	Financial Management	1	-BOD approving the whole budget		PM	Yes	1/19/2023	4/14/2023	1/19/2024	Not Good

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FINANCE SECTION OF PERFORMANCE MEASUREMENT REPORT

FY 2024 PERFORMANCE MEASUREMENT REPORT (OPERATIONS)

June-24

Service Providers

PERSONNEL

	Budget	Revisions	Filled	Vacant
Division Director	1	0	1	0
TOTAL	1	0	1	0

FINANCES

Total Expenses	YTD Planned Expenses	YTD Actual Budget	YTD Actual %
$ 1,369,285.00	$ 1,095,325.00	$ 873,645.00	63.80%

MACROMETRICS

YTD Unduplicated Number of Customers Served	881
YTD Weighted Average Performance	84%

NB: Green means actual exceeds YTD target by more than 15% and red means actual is below 85% of YTD target.

PERFORMANCE INDICATORS

KPI	FY 2024 PLAN	YTD PLAN	YTD ACTUAL	% YTD ACTUAL	% ANNUAL ACTUAL
# Individuals - Enrolled	971	915	864	94%	89%
# Individuals - Case Management Plans Initiated	99	92	64	70%	65%
Readiness	318	272	198	73%	62%
# Indiv Obtain a FT Job	263	222	132	59%	50%
# Indiv Obtain a PT Job	127	106	96	91%	76%
# Indiv Obtain Employment With	77	67	57	85%	74%

LEVERAGE

Oct	$ -	Apr	$ -	YTD
Nov	$ -	May	$ -	YTD Se
Dec	$ -	Jun	$ -	YTD Ma
Jan	$ -	Jul	$ -	
Feb	$ -	Aug	$ -	
Mar	$ -	Sep	$ -	

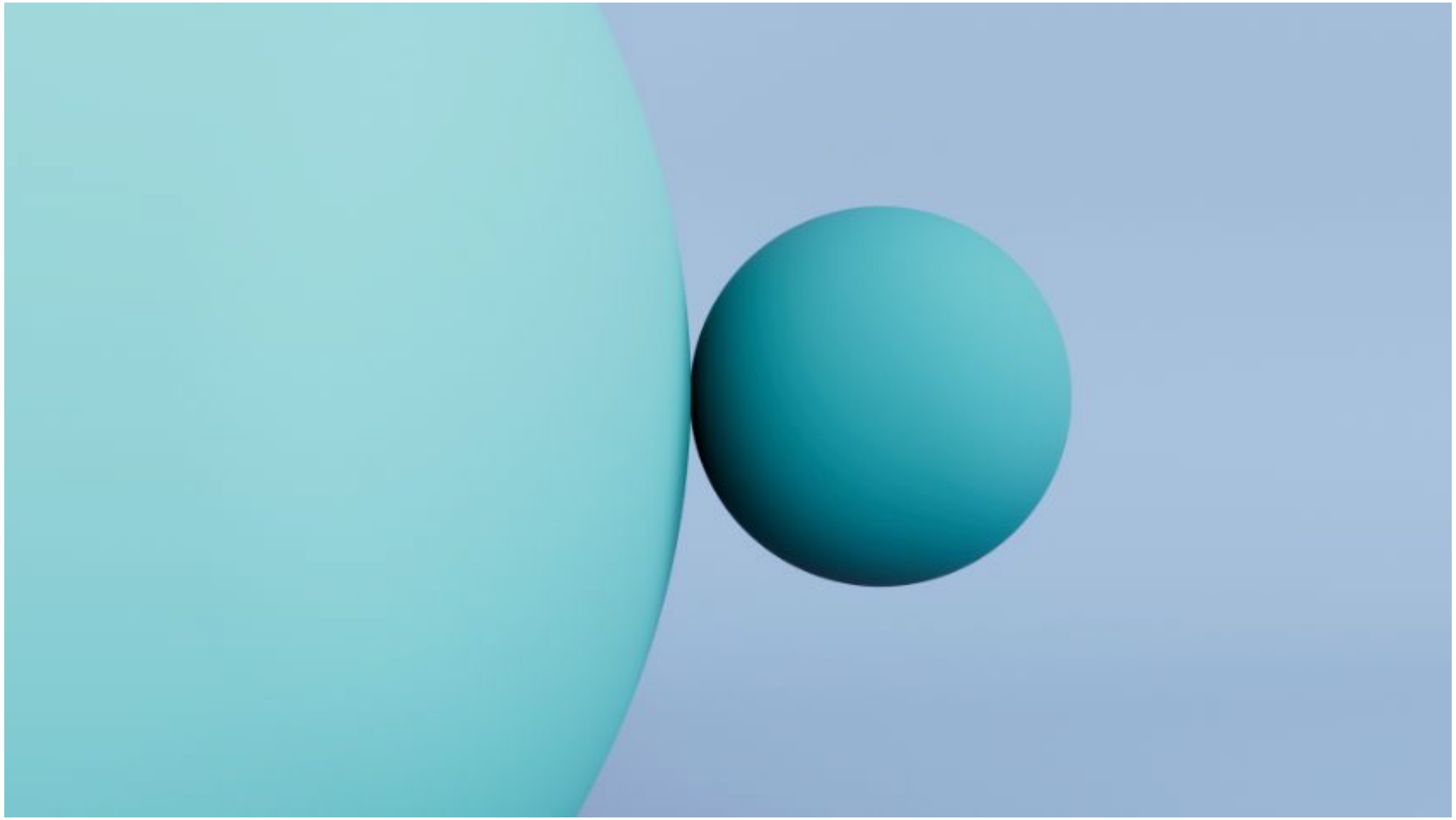
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UPO'S AWSC PROGRAM PERFORMANCE



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ROMA UPGRADED LOGIC MODEL

CNA

Need	City Wide Rank	Domain	Describe if Need is Other
Need for additional supports for at-risk students	12	Education	
	#N/A	#N/A	
	#N/A	#N/A	

Program

Program	Division	Program	Monitor
1	YSD-Youth Services Division	Create	A. Farhan

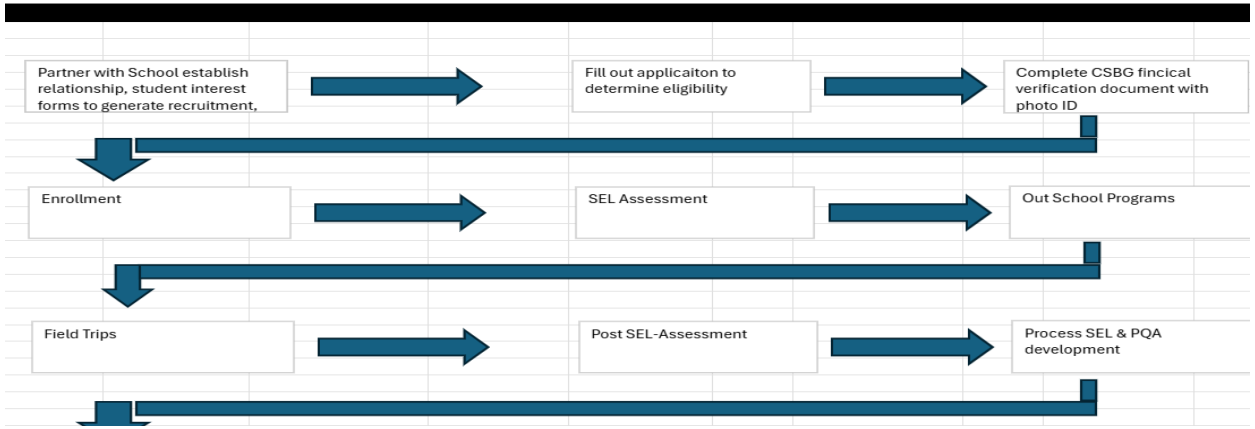
Funding Source	Funder Name	Amount of $ Received	Life Span of Funding (Years)
1	CSBG (Elementry)	454586	3
2	21 Century OST	211387	2
3			
4			
5			

Staff	Position Title	# of Positions	Filled
1	Program Coor	1	1
2	Program Asst (FT)	2	1
3	Program Asst (PT)	1	1
4	Case Mang	1	1

Services/Outcomes

Count	Name of Service	Description of Service	Services Evidence of Services	Projected Services	Data Base CSBG
1	SEL Elementry	Helping students improve socail awareness	DESSA (Devereux Student Strengths Assessments)	75	DESSA website
2	Literacy Workshops	Curriculum based literacy class. Two classes a week for the entire school year.	Class attendance, formative assessment, ongoing assessments, class materials, evidience of student participation in show case.	75	Sharepoint
3	Out of school (Elementry)	After school activities (STEM & Phy Ed)	Agenda, Calanader, sign in sheet	75	Sharepoint
4	Nutrition (Culinary Arts)	Curriculum based food preparation and nurtition class. Twice a week for the school year.	Agenda, sign in sheet, copy of passport book	75	Sharepoint
5	Summer activities (Elementry)	Phy Ed Sports camp; STEM	Agenda, Calanader, sign in sheet	35	Sharepoint
6	Field trips	Taking customers into community	Agenda, Calanader, sign in sheet	75	Sharepoint
7	Tutoring/homework help	General tutoring services on a daily basis, to improve students literacy and numeracy skills/grades	Program attendance (if they are present for program then we assume they received this service)	75	Sharepoint

Customer Path



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PERFORMANCE MEASUREMENT REPORT YTD WEIGHTED AVERAGE PERFORMANCE

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Feb	$ -	Aug	$ -	
Mar	$ -	Sep	$ -	

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PERFORMANCE MEASUREMENT REPORT

MACROMETRICS

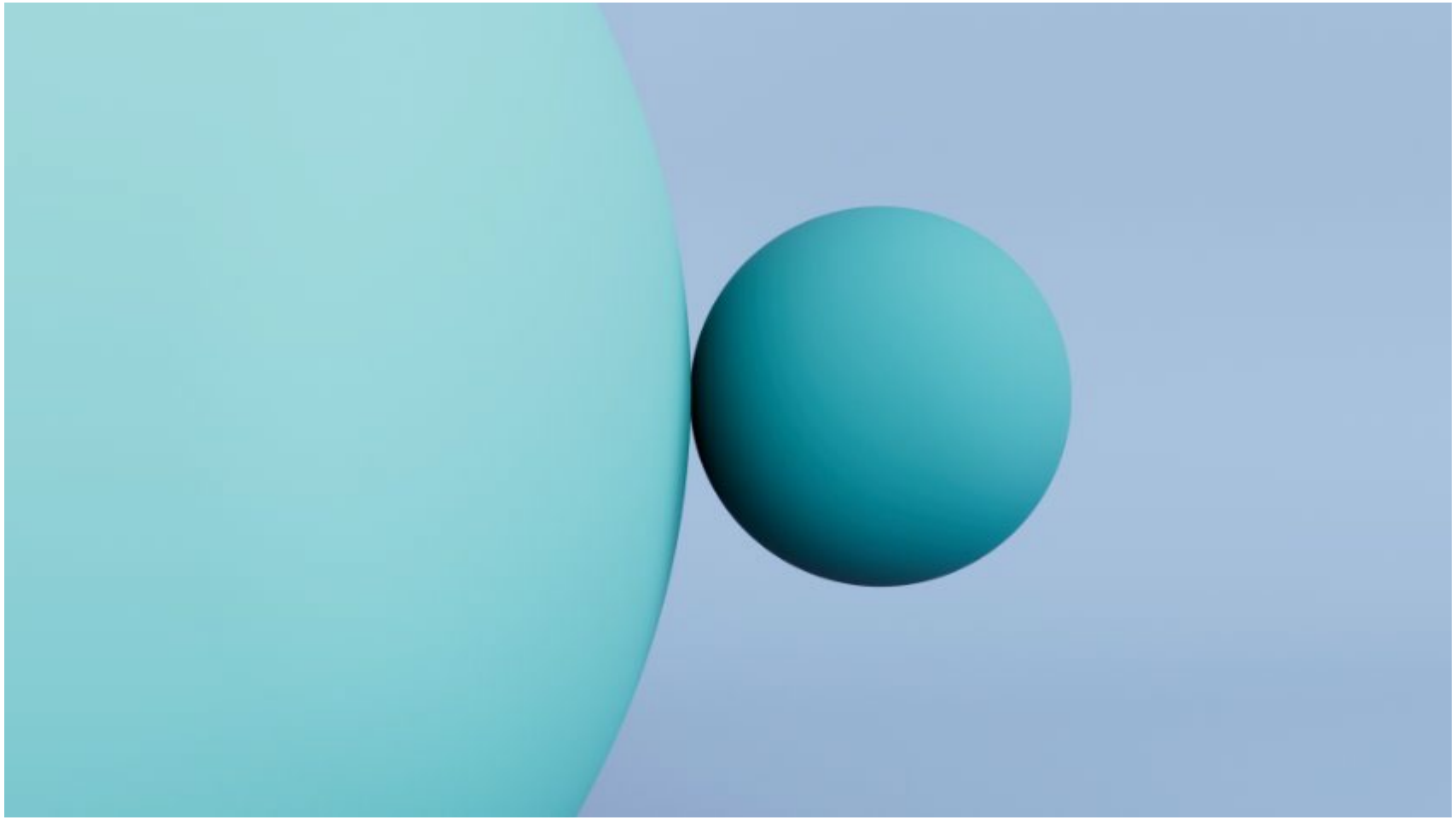
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UPO'S AWSC CSBG ORG STANDARDS



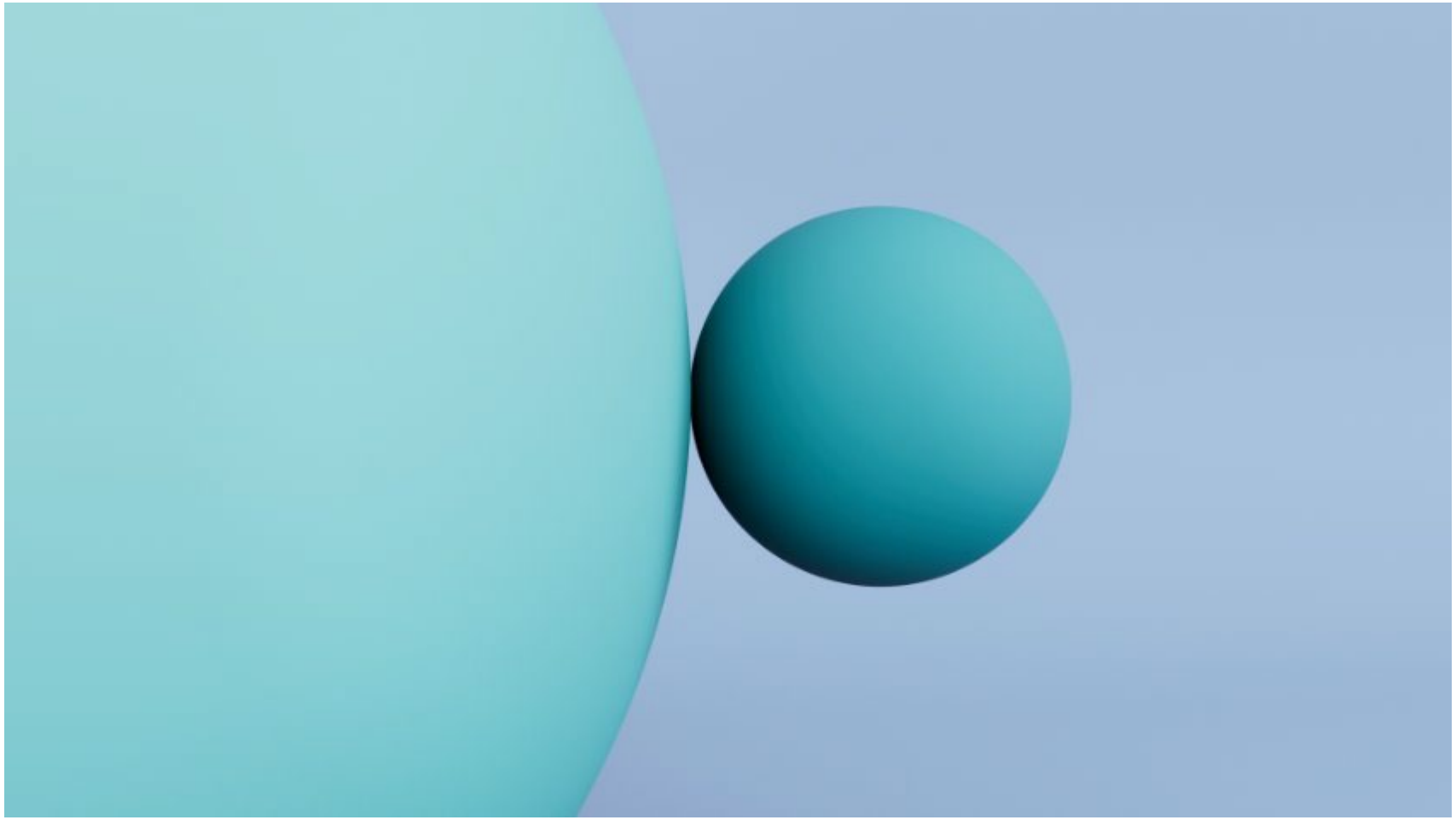
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ORGANIZATIONAL STANDARDS

1	33%	Standard Numb	Standard Description	Standard Category+B:	Shelf Life	Description of Evidence	Office to Contact	Assignmer	Status	Completed Dat	Date Updated	Exp Dat	Standi	Link to Artifact	Follow-Up Note
14		4.1	The governing board has reviewed the organization's mission statement within the past 5 years and assured that: 1.The mission addresses poverty and 2.The organization's programs and services are in alignment with the mission.	Leadership	5	#NAME?	Excutive Assistant; Alice Jordan	PM	Pending		9/2/2023	12/29/1904	Not Good		Asked Daniel and Dianna if
19		4.6	An organization-wide, comprehensive risk assessment has been completed within the past 2 years and reported to the governing board.	Leadership	2	-Comprehensive risk assessment -BOD meeting reviewing CRA	Office of Leagal Affairs; Thersa Lewis	PM	Pending	8/10/2021	9/2/2023	8/10/2023	Not Good		Asked Daniel and Pamela fo
23		4.3	The organization's Community Action plan and strategic plan document the continuous use of the full Results Oriented Management and Accountability (ROMA) cycle or comparable system (assessment, planning, implementation, achievement of results, and evaluation). In addition, the organization documents having used the services of a ROMA-certified trainer (or equivalent) to assist in implementation.	Leadership	1	ROMA Certification; Community Action Plan; Strategic Plan evidence and resources.	CIO, Daniel; Office of Performance Management, Keenan Woods	KW	Yes	9/30/2023	9/5/2023	9/29/2024	Not Good		Got certification from Danie
24		5.4	The organization documents that each governing board member has received a copy of the bylaws within the past 2 years.	Leadership	2	-BOD meeting receiving bylaws	Office of Leagal Affairs; Thersa Lewis	KW/PM	Yes	9/20/2022	1/9/2023	9/19/2024	Not Good	5.4 Evidence	Reached out to daniel to ge
25		2.1	The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.	Community Engagement	1	-Advocacy Division Partner List -Services providers sub-grant agreements	Services Providers; Mark Koiwai & Advocacy; Ayana Biasa	KW	Yes	9/1/2023	9/5/2023	8/31/2024	Not Good		Mark provided enough evide
26		5.8	Governing board members have been provided with training on their duties and responsibilities within the past 2 years.	Governance	2	-Board training		PM	Yes	8/30/2022	1/9/2023	8/29/2024	Not Good		Emailed Daniel and Alice fo

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UPO'S AWSC RECAP



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UPO'S AGENCY-WIDE SCORECARD DOMAIN

SCORECARD

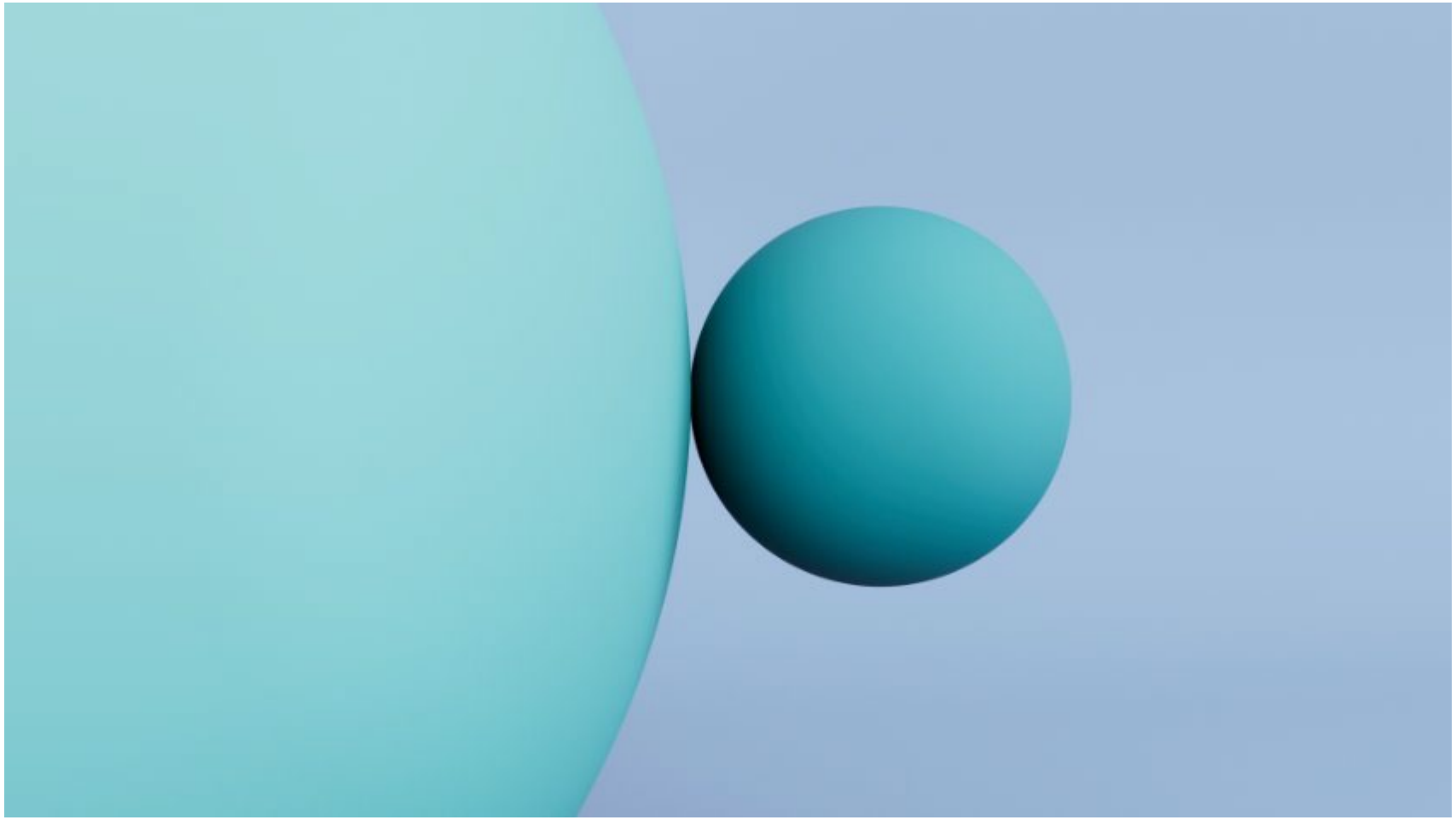
CATEGORY	PERFORMANCE	WEIGHT
Organizational Standards	86%	5%
Agency Strategic Plan	83%	5%
Financial Strength	99%	5%
ROMA / Programmatic Outcomes / Customer Self-Sufficiency	82%	70%
Customer / Staff Input	57%	5%
Program and Administrative Monitoring	48%	5%
Capacity Building & Governance	74%	5%

AGENCY SCORE 80%

(The goal is to attain 85% or more at the end of the fiscal year. Due to COVID19, UPO's operations were severely impacted in fiscal year 2022)

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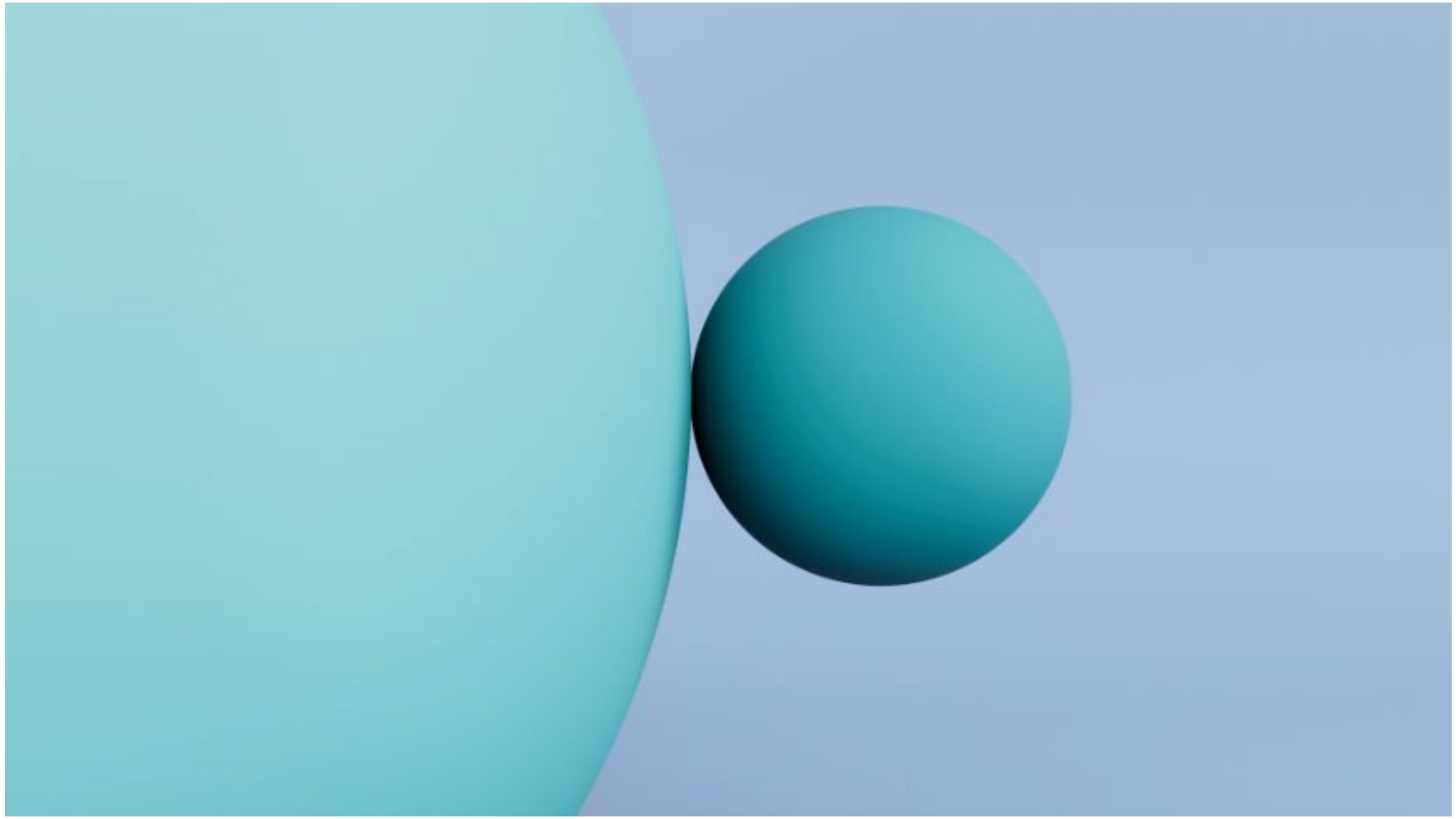
QUESTIONS?



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THANK YOU

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WEBSITE: HTTPS://WWW.UPO.ORG



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AMERICA'S POVERTY FIGHTING NETWORK

Thank you for joining us today!

Please take a couple of minutes to complete the Webinar Evaluation:

https://www.surveymonkey.com/r/PeerData3Spreadsheets

A recording of the webinar and copy of the slides will be posted to the NCAP Resource Library in the next couple of days: https://communityactionpartnership.com/search-categories/

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AMERICA'S POVERTY FIGHTING NETWORK

NCAP's 2025 Management & Leadership Training Conference

January 29–31 (Pre-Con: Jan. 28)

New Orleans, Louisiana

Hilton New Orleans Riverside

