

Researcher contact information:

Greg Schreiter

schr0841@umn.edu

507-990-3557

Note: The views and ideas expressed in this report are sole property of the researcher; these opinions are not necessarily endorsed by the Rochester Public Library or other partner organizations of the Cradle to Career initiative.

Summary of findings

- Efforts to Outcomes seems antiquated, very costly and has some data integrity problems according to online reviews. Lack of transparency regarding pricing is another issue.
- No information available about Clear Impact other than what their website says. Their solution seems more straightforward and comes with fairly transparent pricing. With such a small company, though, I am unsure of whether their product would have good technical support.
- Cityspan has similar limited information available as it is a very small company. Moreover, the amount of customization that the company does leads me to believe it will be expensive (they also decline to be upfront about pricing). However if you would like this company to develop a cloud-based solution tailored to your needs and have it hosted on the company's servers, this may be the solution you desire.
- Sprockets St. Paul is an example of how Cityspan works with organizations to solve complex data-sharing problems. The solution they developed is called the Sprockets shared database, and it allows multiple partner organizations to add data and create reports about program participants (youth) in Saint Paul. It is not a solution that can be used by the library, but it is a good case-study of how Cityspan builds data solutions for organizations if you decide to go that route.
- I think Tableau is a great product overall, but I am unsure of how well it would solve the needs of this complex initiative. Tableau is the biggest company of the four, and the software has well-defined costs for every level of functionality. Tableau works on top of excel or csv files to create visualizations, but I am unsure of the other data formats that the library and other partner organizations have. Could possibly be a solution for some aspects of this problem.

OUTCOMES DATA MANAGEMENT SYSTEM

RESEARCH

Rochester Public Library (RPL) listens to community aspirations and turns them into meaningful opportunities. Our strategic plan, created with extensive community input, provides the blueprint for our daily operations. Yearly action plans include programs, projects, and tasks designed to meet our strategic goals. In late 2016, we partnered with Wilder Research (Amherst H. Wilder Foundation) to create a logic model which enables us to track outcomes directly associated with our action steps. Early results indicate that we are meeting our short-term outcomes and spurring positive community change.

RPL's new logic model--which identifies inputs, activities, outputs, and outcomes-- creates an umbrella for standard evaluation methods. To ensure that community goals are addressed, we use long-term outcomes that correlate with Rochester/Olmsted County Compass Points and the community-wide Cradle to Career initiative. These big picture measurements ensure that our outcomes are on track with the articulated needs of the community.

The goal of this project to review options for data management tool software that will allow managers to effectively track, collate, and assess results for impactful decision making.

Research topics should include the following for each software tool:

- Product Description
- Established
- User Profile
- Ease of Use
- Customer Support
- Customizable
- Report Customization
- Reporting Ease and Appropriateness
- Cloud based
- Multi Organization Logon
- Data Ownership
- Initial Fees/Costs
- Ongoing Access Fees/Cost
- Conclusion

The project could take up to 50 hours. Target completion date of April 1, 2018.

Efforts to Outcomes

- Product Description

An Enterprise Software-as-a-Service (SaaS) Solution for the Human Services Sector. Efforts to Outcomes (ETO) is a comprehensive outcomes and case management tool for large nonprofits, government agencies, and community collaboratives. This powerful platform was built to handle multiple partners, high volumes of programs, advanced security protocols, and multifaceted reporting and analytics initiatives.

- Established

Social Solutions is a 200+ person software company with headquarters in Baltimore, Maryland, and Austin, Texas. Social Solutions was founded in 2000, and released Efforts to Outcomes in 2001 as a way to keep track of clients' medical data records.

The company provides performance management software for human service organizations, including Harlem Children's Zone, the Annie E. Casey Foundation, the Administration on Aging, the United States Department of Housing and Urban Development, and organizations in the cities of Boston and Hartford, Connecticut. Social Solutions' software products, called Efforts to Outcomes (ETO) and Apricot, help organizations measure the progress that they make with participants and families.

- User Profile

Many of the users of the software are nonprofits or government organizations. The software seems to be most effectively used in large school districts, and networks of churches or homeless shelters in a large city.

- Ease of Use

The computers running the software must have Windows with Internet Explorer installed - this is the only official way to access Efforts to Outcomes software. The point-and-click interface for the software seems rather outdated.

- Customer Support

Support is available through phone, chat, and email. All registered users of ETO will have unlimited access to the support team.

Hours of tech support availability:

Sunday 4 PM - 2:30 AM EST

Monday - Thursday 8 AM EST-2:30 AM EST

Friday 8 AM EST- 6 PM EST

- Customizable

ETO software is highly customizable allowing the system administrator to add and change field and button names and add additional formatting to fields and assessment questions. All fields, reports, dashboards, and forms can be customized by the agency through easy to use wizard tools. Social Solutions' best practice training program for new customer organizations and their ETO Administrators ensure self-sufficiency in ETO. However, each add-on costs an additional undisclosed amount of money.

- Reporting Ease and Appropriateness

Seemed easy enough to generate basic reports based on simple statistics. This software looks like it is best-suited for controlling large amounts of data for many sites at once (for example, different programs in a school district or a network of churches in a very large city).

- Cloud based

Exclusively cloud-based software. Must access ETO through Internet Explorer 10 on a Windows PC. Each additional access point or organization looking to access the data will pay a fee for access to the software.

ETO software is a fully hosted, cloud based, SAAS solution. With ETO, your data will be securely stored on our servers through Sungaurd Data Systems. For more information on our data security and hosting procedures we are happy to provide you with documentation.

- Multi Organization Logon

If data sharing agreements are in place between the customer and a third party agency then a member of that agency may either log into the database of the customer or data can be sent to the agency via data integration methods. Who and what third party agency users can see is determined first by data sharing agreements, then by user role and security permissions. ETO has 9 levels of role based security, one of those roles includes the ability to provide access to an individual to view reports.

- Data Ownership

All of the data stored in ETO is owned by the agency. The data is stored in a secure server.

- Ongoing Access Fees/Cost

Not transparent about pricing - have to talk to a sales representative to find out. We suspect that the cost is a percentage of the operating budget of the organization.

- Conclusion

Difficult to recommend this as a solution based on negative reviews online and lack of transparency regarding pricing.

- References

Social Solutions page for Efforts to Outcomes software

<https://www.socialsolutions.com/software/eto/>

Social Solutions representative's responses to similar questions

https://static1.squarespace.com/static/51dc541ce4b03ebab8c5c88c/t/53fd355de4b0d9d29774627d/1409103197253/2014_08-23_ETO-SocialSolutions.pdf

Verified Reviews of ETO Software

<https://www.g2crowd.com/products/eto-software/reviews>

Clear Impact

- Product Description

With Clear Impact Scorecard, you can aggregate your process and population data into high-level performance reports. Track the performance of your programs, measure the impact of your funding and report on the progress of your mission to demonstrate results to funders, board members, and community partners.

- Established

Clear Impact was established in 2007 in Rockville, MD. It is a smaller company of around 50 employees. The company also has a small (5 employee) office in Edina, MN.

- User Profile

1,000's of organizations, in over 40 states and 5 countries.

Highlighted accounts: United States Department of Education, Annie E. Casey foundation, National Institutes of Health, Promise Neighborhoods, United Way Worldwide, Health Resources and Services Administration.

- Ease of Use

Clear Impact Scorecard is built upon proven performance improvement techniques from the Results-Based Accountability (RBA) framework. The Virtual RBA Facilitator tool is a series of short videos designed to guide new users through each step of the most important aspects of improving performance regardless of your experience.

There are two bulk ways to get data in & out of the software. CSV files are used by many users for desktop data operations, such as moving data values from Excel into the Clear Impact Scorecard. Our API (Application Programming Interface) is used for more technical, more automated tasks, such as keeping other software systems in sync with Scorecard.

Template Library: To help you get off to the fastest start possible, we have compiled a library of commonly used scorecards from various communities and organizations from around the world, including but not limited to, Promise Neighborhoods, Campaign for Grade Level Reading, United Way, Robert Wood Johnson Foundation, and the Public Health Accreditation Board.

- Customer Support

Not listed on website, but it is available.

- Customizable

You can easily use the language editor to change the labels for different software “objects.” For example, if you wanted to change your “Results” to “Goals” or your “Measures” to “Metrics” you can easily do so without any programming skills required. Using the language editor will allow you to quickly align the structure of the software to work with your chosen methodology.

Can create custom dashboards with Scorecard Fast Builder. Create and configure an entire scorecard with all of its Results, Indicators, Programs & Performance Measures all on the same screen. Visualize the structure of your scorecard as you build it, and make quick edits on the fly.

- Report Customization

Clear Impact Scorecard comes with many pre-designed modern reports for the most common performance management tasks, but we know sometimes you need something really specific. Our custom ad-hoc reporting engine has you covered. Custom Reporting is a business intelligence module that allows you to connect directly to your software database and quickly transform raw data into useful and readily understood reports.

- Cloud based

Exclusively cloud-based software - need to have an internet connection with browser to log in to the system.

Clear Impact Scorecard runs beautifully on all modern web browsers and requires no additional plugins or resources to be installed on local computers. All you need to start improving outcomes today is a browser and an internet connection. Our supported browsers include: Mozilla Firefox 20+, Google Chrome 12+, Microsoft IE 9+, Apple Safari 6+, and other modern browsers.

- Multi Organization Logon

Clear Impact Scorecard customers can link together, so you can easily connect with your partner organizations to share data, coordinate efforts, and create collective impact. This feature is particularly useful in sharing specific scorecards in reporting to specific funders. Others may

just use it locally to collaborate towards a common agenda. Each partner organization must purchase a subscription to be able to access the software/data.

- Data Ownership

Unclear as of now, but likely a similar data ownership and storage model to Efforts to Outcomes.

- Initial Fees/Costs

5 users: \$250/month

10 users: \$500/month

Support fees: ?

- Conclusion

Not enough information currently available to recommend this as a solution

- References

Most information above was taken from <https://clearimpact.com/scorecard/features/> and <https://clearimpact.com/>

Tableau

- Product Description

Tableau is a data visualization and analytics platform that is designed to handle large amounts of data (as well as so-called “big data”). Most of the applications seem to be oriented towards more traditional quantitative-style data.

- Established

Tableau Software was established in 2003 and now employs roughly 3500 employees. In 2013 the company became publicly traded, and raised \$250M in its IPO.

- User Profile

Tableau has over 50,000 customer accounts in a wide range of industries. The most accounts are in education, banking, insurance, entertainment, healthcare and technology organizations. Nonprofits make up a very small percentage of the accounts, while large government agencies have a slightly larger share.

- Ease of Use

This system was designed to handle numerical/quantitative data, but it can work with qualitative data as well. It works well with Excel data or data in csv format, but it can also work with relational databases and “big data.” The majority of the support is for quantitative data. There are a limited amount of articles regarding Tableau being used for qualitative and survey data, but most of the use cases are quantitative in nature.

- Customer Support

Support hotline: (206) 633-3400

Support hours: 6:00 AM to 6:00 PM Pacific

Support Website: <https://www.tableau.com/support/>

- Customizable

Tableau desktop can be customized to suit the type of data you are working on.

Both desktop (personal and professional) and cloud-based solutions available. Must have professional version to upgrade to cloud-based solution.

- Multi Organization Logon

This functionality is available, but unclear how it would work.

- Data Ownership

For the desktop version, all data will be locally stored on servers. For the cloud-based version, whoever posts the data is the owner of the data.

- Initial Fees/Costs

Free version: analyze data, add visualizations to web pages and blogs.

Personal Edition: \$35/month/user

Professional Desktop Edition \$70/month/user

The professional edition can be upgraded to a cloud-based solution for an additional \$42/month/user

- Conclusion

Tableau was designed for quantitative data, but there are packages available for working with survey data. It may be a good fit for some of the library's (and partner organizations') data visualization needs.

- References

Information taken from <https://www.tableau.com>

Cityspan

- Product Description

Cityspan is a leading cloud-based provider of data management systems for tracking social service programs, funding, and outcomes. For more than 15 years, we've helped schools, government agencies, and nonprofit organizations design and apply field-friendly tools that streamline workflows, demonstrate accountability, and drive analyses for improved performance. Working with you, we fit our technology to your organizational objectives, funding requirements, and data priorities.

- Established

Small company of around 40 employees.

- User Profile

Cityspan has a variety of customer accounts in the education, nonprofit and government sectors. Most of the highlighted accounts are very large organizations with very complex needs - examples are the Los Angeles School District tracking after-school student and program information, and also the Chicago Public School district managing various programs for its students. The name of the company is illustrative of their focus, which is integrating data solutions for very large organizations in education and government.

- Customer Support

Our knowledgeable support staff are available by phone or online to answer any questions about using your Cityspan solution. Get live support by calling our toll-free help line Monday through Friday, during business hours. Or, post a message on our Issue Tracker at any time.

Live Support

Monday through Friday

8 am-5 pm Pacific Time (11 am-8 pm Eastern Time)

866-469-6884 (toll-free)

Please have the following information ready, so that we can help you quickly:

Your state / Your organization name / Your site name / Your username

If you call during business hours but no one answers, we are helping other clients and can't take your call. Please leave a message. We will return your call within one business day.

Instead of calling, you can post a message on our Issue Tracker at any time. Whenever an issue is posted, the Issue Tracker automatically alerts our technical team.

Within one business day, we will reply directly to your issue on the Issue Tracker, where you and your colleagues can view all issues and responses.

- Customizable

Cityspan works with your organization and builds a customized solution targeting your needs, then deploys that solution to their servers. All data that you enter via the application is hosted on their servers.

- Cloud based

Cloud-based / web-based, need a computer with internet connection to access the software.

- Data Ownership

The data is hosted remotely on Cityspan's servers, but you would retain ownership of the data that you enter.

- Initial Fees/Costs

Not transparent about pricing - have to talk to a representative to find out. Based on the level of customization required (they build an application from the ground up for you), this option sounds very expensive.

- Conclusion

If you would like this company to develop a cloud-based solution tailored to your needs and have it hosted on the company's servers, this may be the solution you desire.

- References

Information taken from <http://www.cityspan.com>

Sprockets St. Paul

- Product Description

Sprockets is a strong network of after-school and summer programs for kids and teens in Saint Paul. It is a collaboration of community organizations, St. Paul Public Schools and the City of St. Paul. Cityspan created a single, integrated citywide data tracking system for this program to allow multiple providers to enter data and create reports about the participants.

The Sprockets database tracks participation and outcomes for more than 7,400 youth in 33 summer and afterschool programs annually. Providers as diverse as the United Way, the Parks and Recreation department, and local churches can now access a common set of student data from the Saint Paul Public Schools. They can select individual student records, see all services each student receives, and track their participation in these programs.

With the system's automated reporting features, Sprockets program administrators and providers can give funders and stakeholders a quick and accurate overview of program participation by provider. They no longer have to manually review and analyze paper records or separate spreadsheets.

Cityspan has given program administrators the necessary information to make decisions about expanding or starting new programs. It has also enabled them to better link in-school and out-of-school learning outcomes and show the impact of OST participation on the city as a whole.

- Established

The Sprockets Shared Database was started in March 2011 and it collects and stores information from out-of-school time (OST) providers all across Saint Paul. At Sprockets, we hear time and again from our network of program providers how difficult it is to answer big-picture questions about OST as a whole. We wondered:

How many youth in Saint Paul are participating in OST?

What types of programs do they attend and how frequently?

Where are the opportunity gaps?

What kind of an impact is OST making on youth in Saint Paul?

How can we do even more?

The Sprockets Shared Database was created to help answer those kinds of questions, while improving the quality of information about and for the entire OST community. Comprehensive information about the state of OST in Saint Paul will help us make decisions about expanding or starting new programs, better link in-school and out-of-school learning outcomes, and show the impact of OST participation in our community. What do you want to know? Join us. Let's put the

data together and learn! To see what questions we're answering, check out our 2014-2015 Afterschool Data Report (available at http://www.sprocketssaintpaul.org/sites/default/files/downloads/page/SprocketsReport_2015_Digital.pdf)

- Customer Support

Customer support for this solution is provided by Cityspan.

- Customizable

This database software was built from the ground up by Cityspan to be specific to the needs of the Sprockets program. The software includes the following features:

Standardized data collection citywide

Online database to track and manage OST services delivered to more than 7,400 youth

Integrated data management across diverse programs

Quick and accurate reporting on program participation

Use of school district data to provide OST agencies with a better understanding of student characteristics

Analysis of services to individual students across multiple providers (wraparound view)

Expansion of the Sprockets network to include more youth-serving agencies

- Cloud based

Yes, this database is cloud based and hosted on Cityspan's servers.

- Multi Organization Logon

For the Sprockets St. Paul Database that Cityspan designed, multiple partner organizations can log in and both view and edit the data.

- Conclusion

This is not an appropriate solution for the library, but it is a good example of how Cityspan can work with a large organization to address complex needs and requirements.

- References

Details about Cityspan's data work with the Sprockets program:

<http://www.cityspan.com/casestudies/city-of-st-paul>

Details about how the Sprockets program is organized can be found here:

<https://www.sprocketssaintpaul.org/>

For more information about the Sprockets Shared Database and its implementation via Cityspan, please contact Erik Skold at erik.skold@ci.stpaul.mn.us or 651-744-7738