

Congreso de Latinos Unidos, Inc.

Strategy to Outcomes: Program Design for Impact

October 17, 2024 | 1:45PM-3:45PM



Session Agenda

- Welcome and Introductions
- Who's in the Room?
- Overview of Congreso and **Program Design Strategy**
- Congreso's **Design Index**; Overview and Brief Assessment
- Examples of **Design Projects** and Workstreams
- Return on Investment for **Building a Design Culture**
- **Assessing your Organization** and How to Get Started
- Discussion and Q&A

About Congreso de Latinos Unidos



Congreso is a multi-service non-profit organization located in Eastern North Philadelphia, whose mission is to enable individuals and families in predominantly Latino neighborhoods to achieve **economic self-sufficiency** and **wellbeing**.

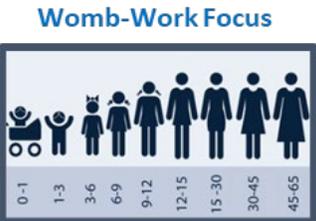
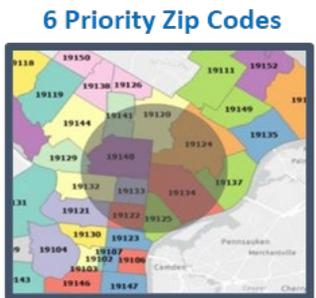
About Congreso de Latinos Unidos



- **13,640 Unique Clients Served in FY24**
- **North Philadelphia Catchment Area**
 - Census Blocks Surrounding Congreso's Headquarters in Zip Code 19133
- **\$28M Annual Budget**
 - ~80% Government, ~15% Corporate & Foundation, ~5% Events & Donors
- **200 FT Staff + 30 PT Seasonal Staff**
- **4 Programmatic Divisions**
 - Family & Parenting Services + Housing and Financial Stability Services + Healthcare Services + Education & Workforce Services
- **8 Service Departments, Comprised of 18 Team Units, Operating 45+ Programs**
 - Child Welfare + Housing + Domestic Violence + HIV/AIDS Services
 - Health Center + Adult Education + K-12 Afterschool + Workforce Development

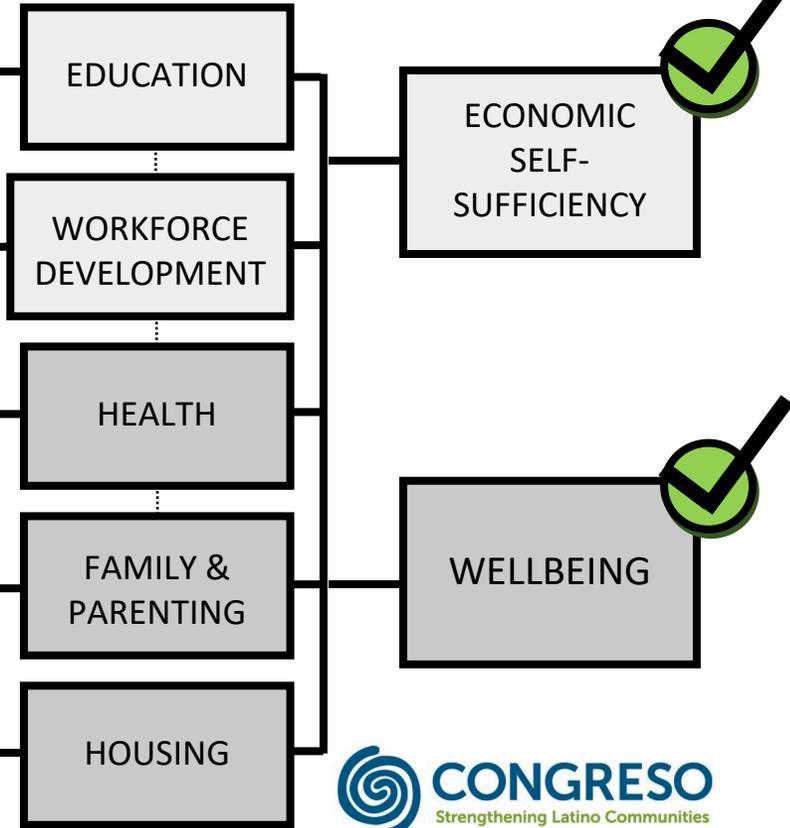


Congreso's Theory of Change: 2018



CONGRESO'S PROGRAM PORTFOLIO

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How Congreso Got Started with Design

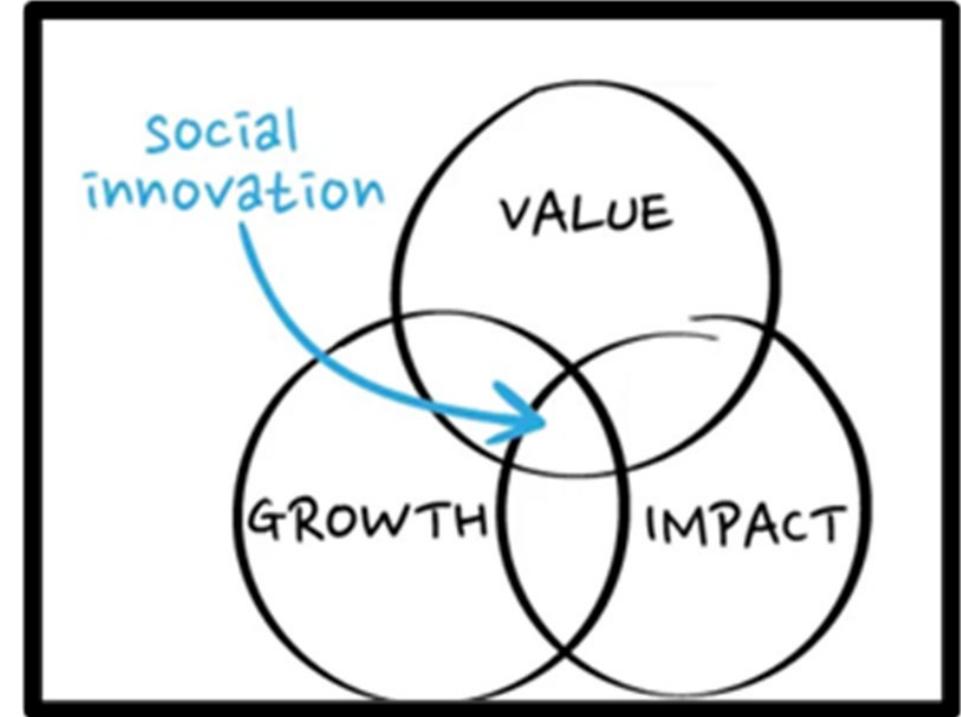
- We knew we needed a uniform way to talk about performance, growth and strategy to accomplish our refreshed mission; chose to implement **Human-Centered Design (HCD)**
- In order to get started with **HCD tactics**, we first needed to understand our current capacity and gaps
- We looked for a **mechanism to assess the organization**, analyze the results and gather insights to drive tangible workstreams toward becoming a higher performing, more innovative organization
- Our aim was to increase our **design acumen, behaviors and culture**, to carry out our TOC and build our impact, value and scale as an organization

HUMAN-CENTERED DESIGN: What is it exactly?

HUMAN-CENTERED DESIGN...

...is a set of problem-solving techniques that **put end-users at the center of the development process**, enabling organizations to create products and services uniquely tailored to their audience's nuanced needs, expectations and mindsets.

Congreso uses HCD tools and techniques to drive social innovation down to the Client level, seeking to continuously enhance the **Impact, Value, and Growth** (Scale) of its services.



How Congreso Interprets HCD: Principles

- **“Designerly Behaviors”** empower staff to better investigate, understand, and account for the nuanced needs of our clients and their experience throughout our services, and gives them the tools to make improvements
- **Client & Staff Voice** is paramount, and we seek out opportunities for participatory design wherever possible
- **User Behavior Data & Insights** drive decision making and continuous adjustments to services
- **The Staff-Client *Interaction*** is Congreso’s “product” and held in highest esteem
- **We seek to customize every feature** of every program for our end-users, regardless of the funding stream, or constraints that come along with it

How Congreso Got Started with Design

- With a Design Consultant, we reviewed the **research-based McKinsey Design Index**, which analyzes areas such as:

- Analytical Leadership
- Cross-Functional Talent
- Mission Clarity
- Continuous Iteration
- Client and User Experience
- Resourcing and Managing Design



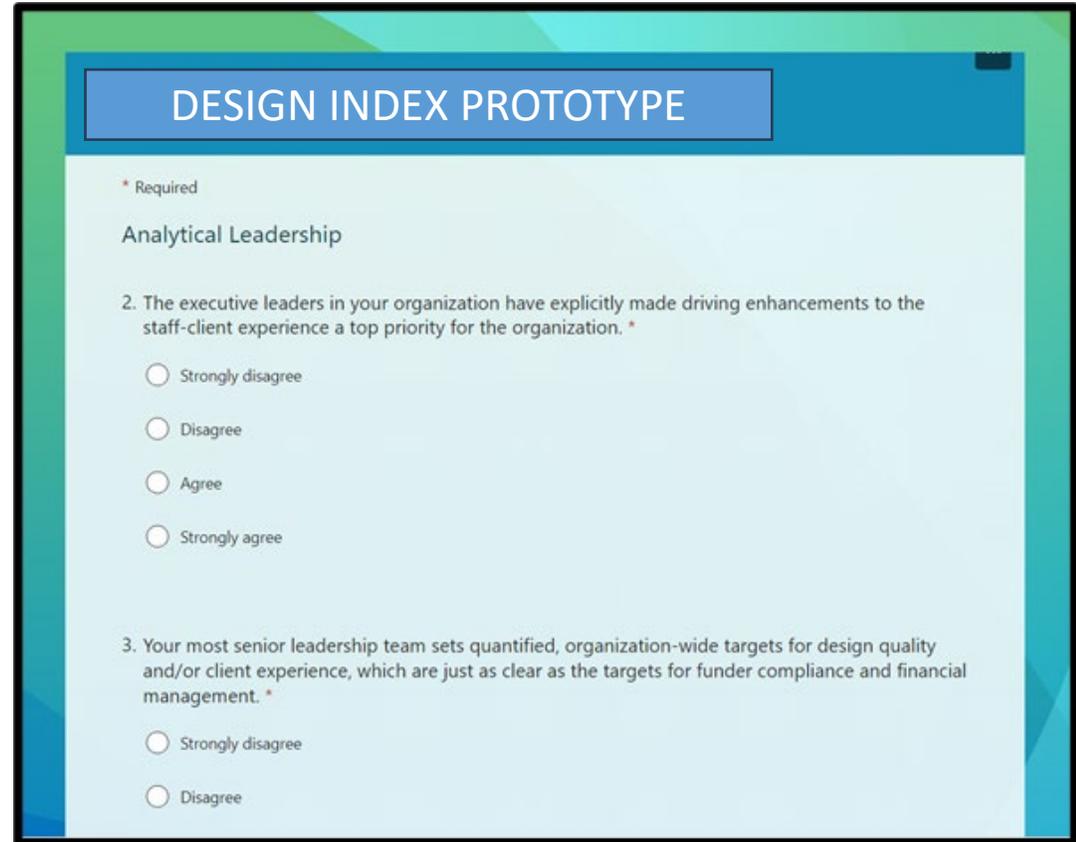
- Our original score was **16/100** when we first took the index in 2018!
- Our score is now closer to **~60/100** -making progress but still have plenty to work on to keep increasing our capacity and skills

How Congreso Got Started with Design

- The McKinsey Index is a great tool to start, but is tailored to the for-profit industry
- Congreso is currently developing a **Social Services Design Index**, to help organizations assess their capacity and acumen for integrating human-centered design into social services settings
- This is the sample Index you'll take today!

Design Index-Instructions for Assessment

- **Take the Social Services Design Index!**
 - Today we have prepared a lite version of the Index for you all to take!
 - Using the QR code provided, take 10 minutes to answer the multiple-choice questions.
 - Answer for yourself, or on behalf of your organization – this is just to get a feel for what taking the assessment looks like.



DESIGN INDEX PROTOTYPE

* Required

Analytical Leadership

2. The executive leaders in your organization have explicitly made driving enhancements to the staff-client experience a top priority for the organization. *

Strongly disagree

Disagree

Agree

Strongly agree

3. Your most senior leadership team sets quantified, organization-wide targets for design quality and/or client experience, which are just as clear as the targets for funder compliance and financial management. *

Strongly disagree

Disagree

Design Index-Instructions for Assessment



Design Index-Instructions for Assessment

After you submit,
we encourage you
to **save a PDF** of
your responses.

Design Index - Prototype

✓ Thanks!

Your response was submitted.

Keep the information with you by saving your response.

Save my response

Print or get PDF of answers

DISCUSSION TIME

Discussion at Your Table



- **What was the experience** like taking this tool?
- **Who in your organization** would you want to take this survey with you?
- How would a tool like this **contribute to your organization's strategic goal setting?**
- **What would be next steps?** Any 'aha' moments? Quick wins?
- **What might be low-hanging fruit vs. a heavier lift?** What do you perceive might be some challenges in pursuing next steps?

Design Index-Congreso Examples

Based on Congreso's original score, we asked ourselves:
"How Might We increase the organization's Design acumen?"

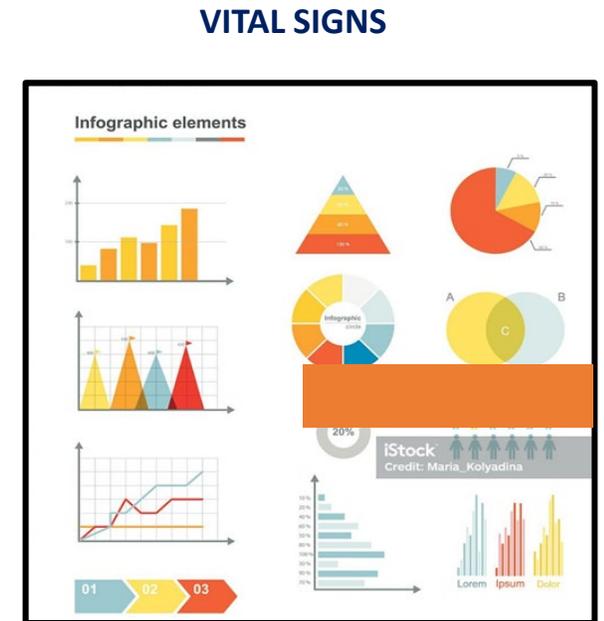
We identified workstreams in the priority areas:

- Analytical Leadership
 - Fostering Design Culture
 - Mission Clarity
 - Performance Management
 - Resourcing and Managing Design
- The Index illuminates **areas of opportunity**; we'll share some examples of how we raised our index score to become a design organization to increase our impact



Design Index-Congreso Example Workstreams

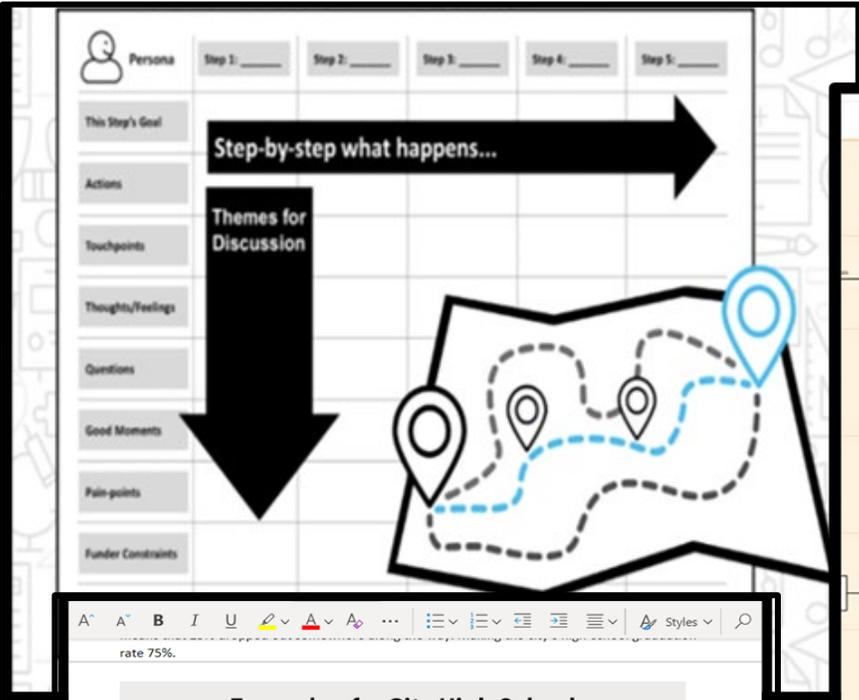
- **Analytical Leadership** - Increased C-Suite awareness of HCD skills and culture-building through shared reading and language; specific Design Sessions with Executive leadership
- **Mission Clarity** - Strong commitment to TOC parameters; strategic grant writing to avoid mission drift
- **Performance Management** - Institution of “Vital Signs” reports to monitor contract performance agency-wide
- **Resourcing Design** – Creative budgeting and advocacy to funders; “Shark Tank” Challenge with minimal flexible dollars; Creation of FT Innovation Manager role



Design Index-Workstream Deep Dive

- Launched innovative HCD initiatives to **foster a Design Culture** and strong **Performance Management** across our 45+ programs
- Worked with Design Consultant to iteratively design and test over 75 HCD tools within our program teams to determine which tools had the most value for teams for social service innovation
- The final compilation of design tools resulted in our homegrown **Design Toolkit**, available to all staff on our internal dashboard
- The Toolkit contains **15 tools** with training videos, facilitator guides, downloadable templates and worksheets, to allow staff to autonomously host Design Labs

Congreso's Design Toolkit

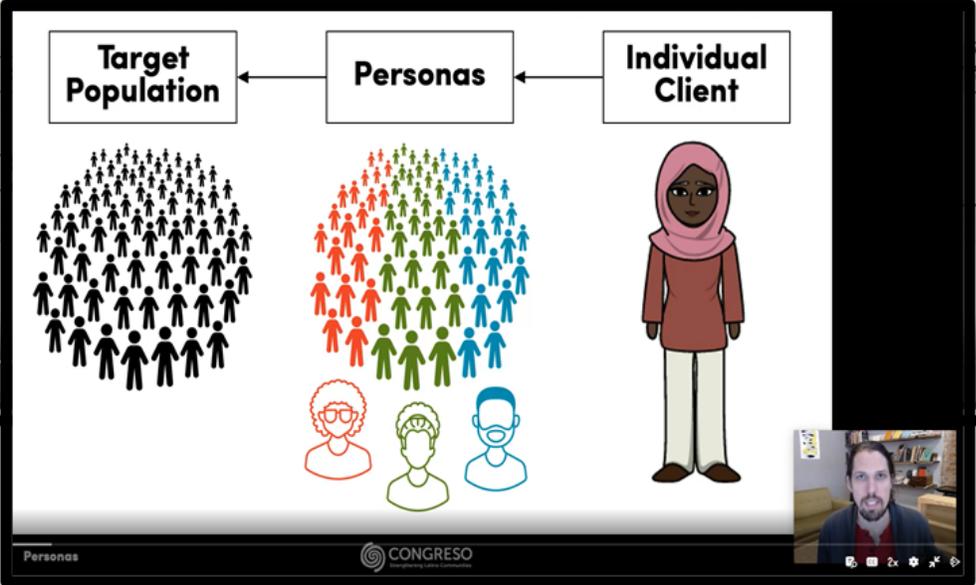
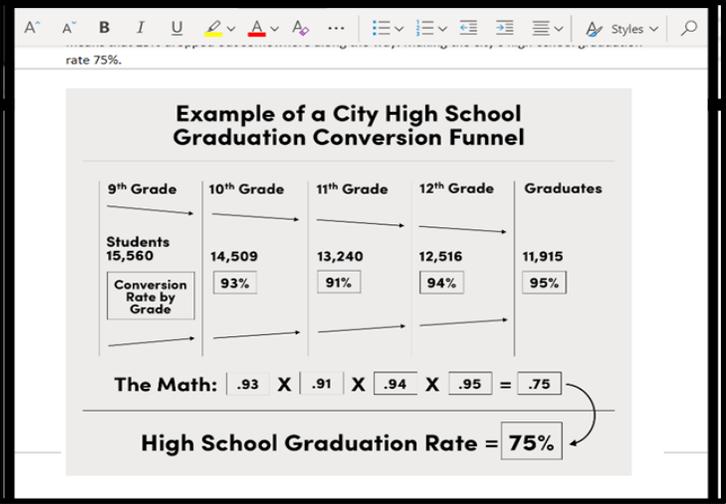
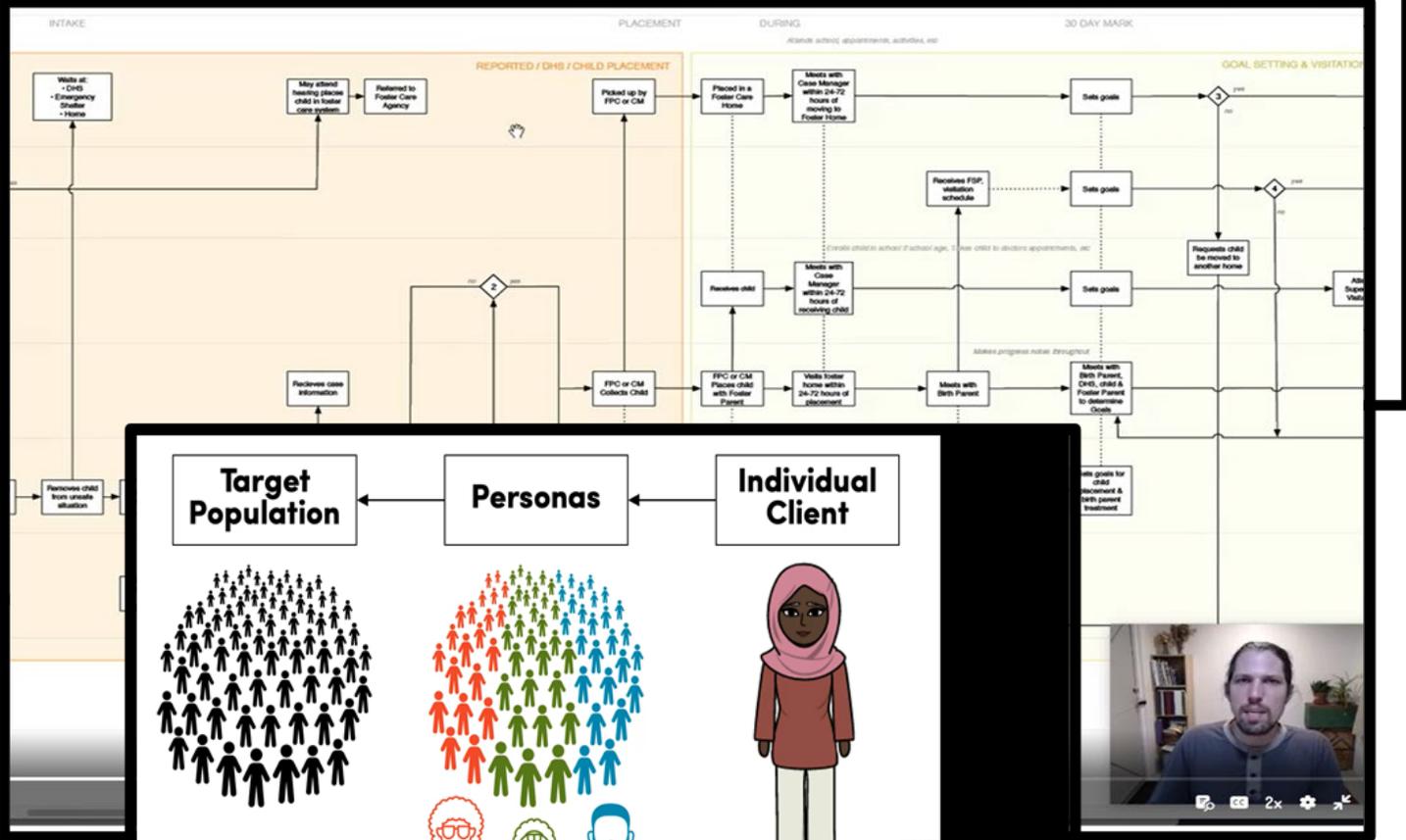


Define Your Design Challenge

Program Name: _____

What is the challenge or issue you want to address and why is it important?

Describe who will benefit from addressing this and why?



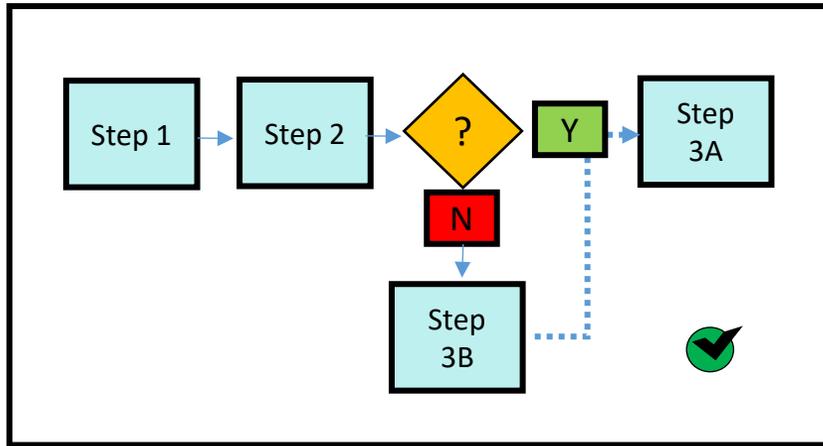
Examples of Design Tools

- **Personas** - embody the **collective voice of your clients** into a few representatives for whom you intend to design
- **Process Flow Diagrams**- illustrates step-by-step all the components of your program. They also illustrate **key decision points** that are made throughout the process and how those decisions may send someone into a different part of the service flow
- **Client Journey Maps** - outline all the interactions your client has with your service. It's a **visual representation of the "journey"** your client goes through to achieve their goal (or otherwise, drop off)
- **Conversion Funnels** - simple math that tracks the flow of clients through your program. The goal of a conversion funnel is to define a conversion rate. The conversion rate is the percentage of clients that successfully reach your program's outcome. Conversion rates answer the question: **Is the program doing what it set out to do?**

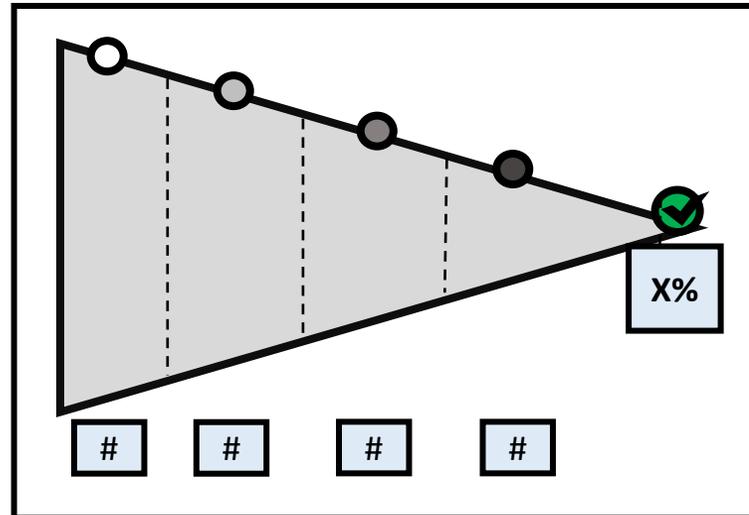
Design Tool Overlap



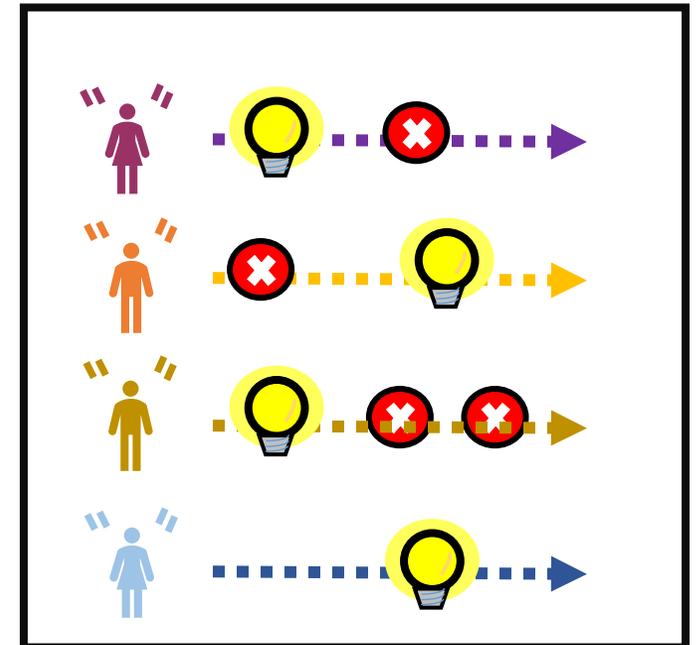
PROCESS FLOW MAPS



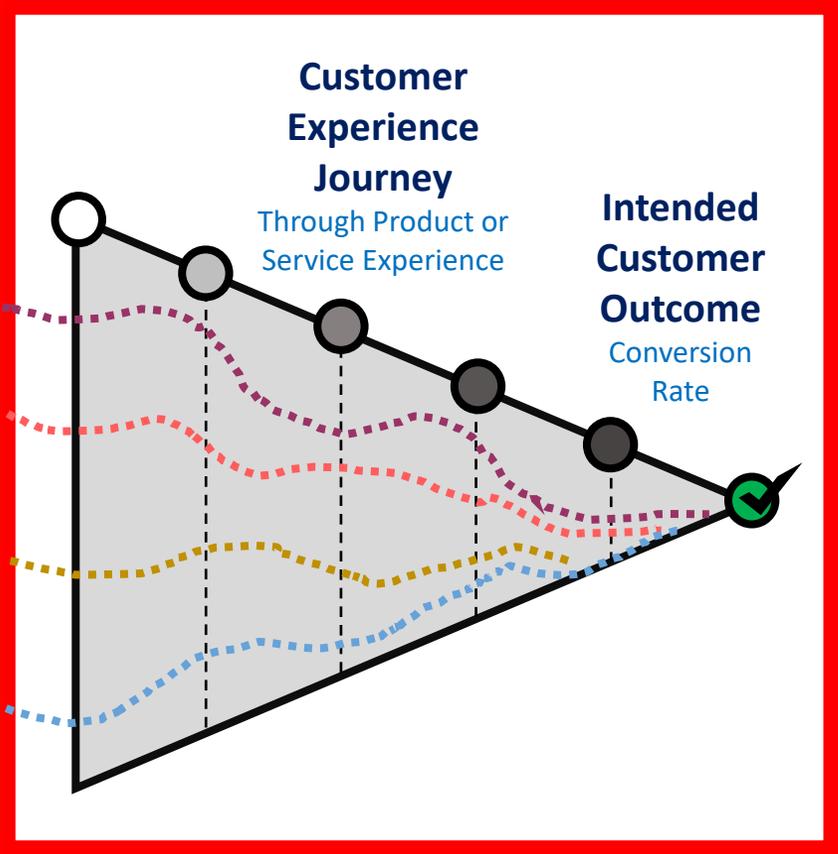
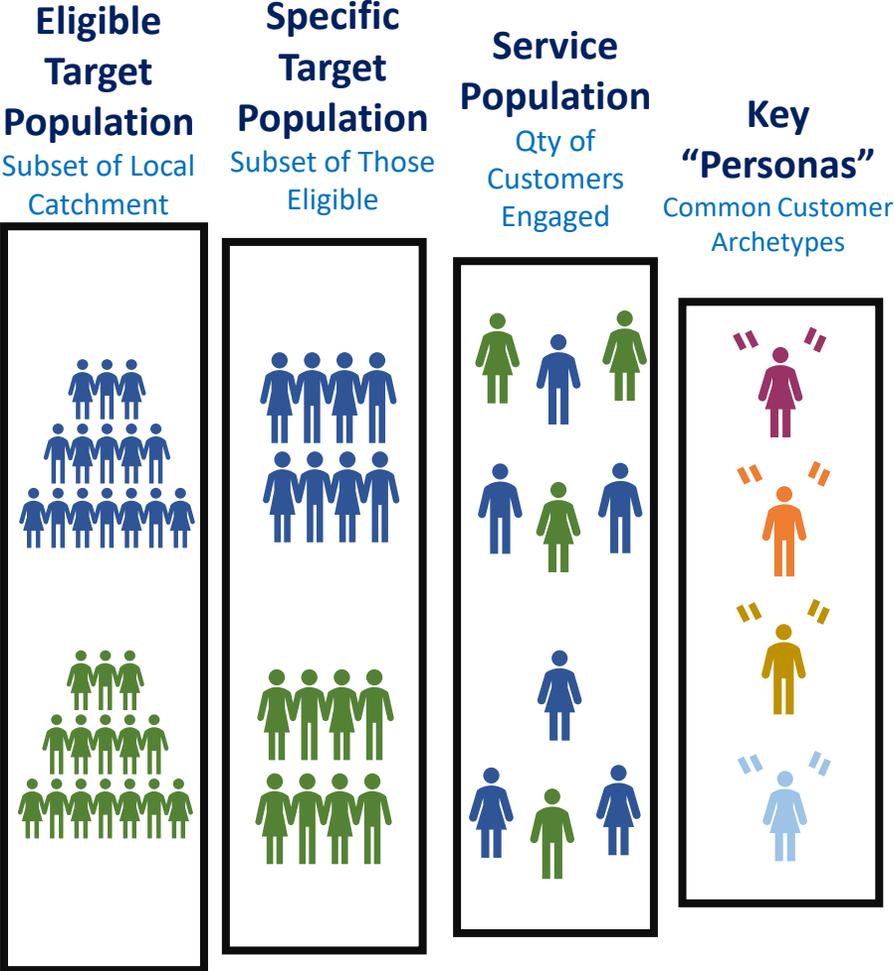
CONVERSION FUNNELS



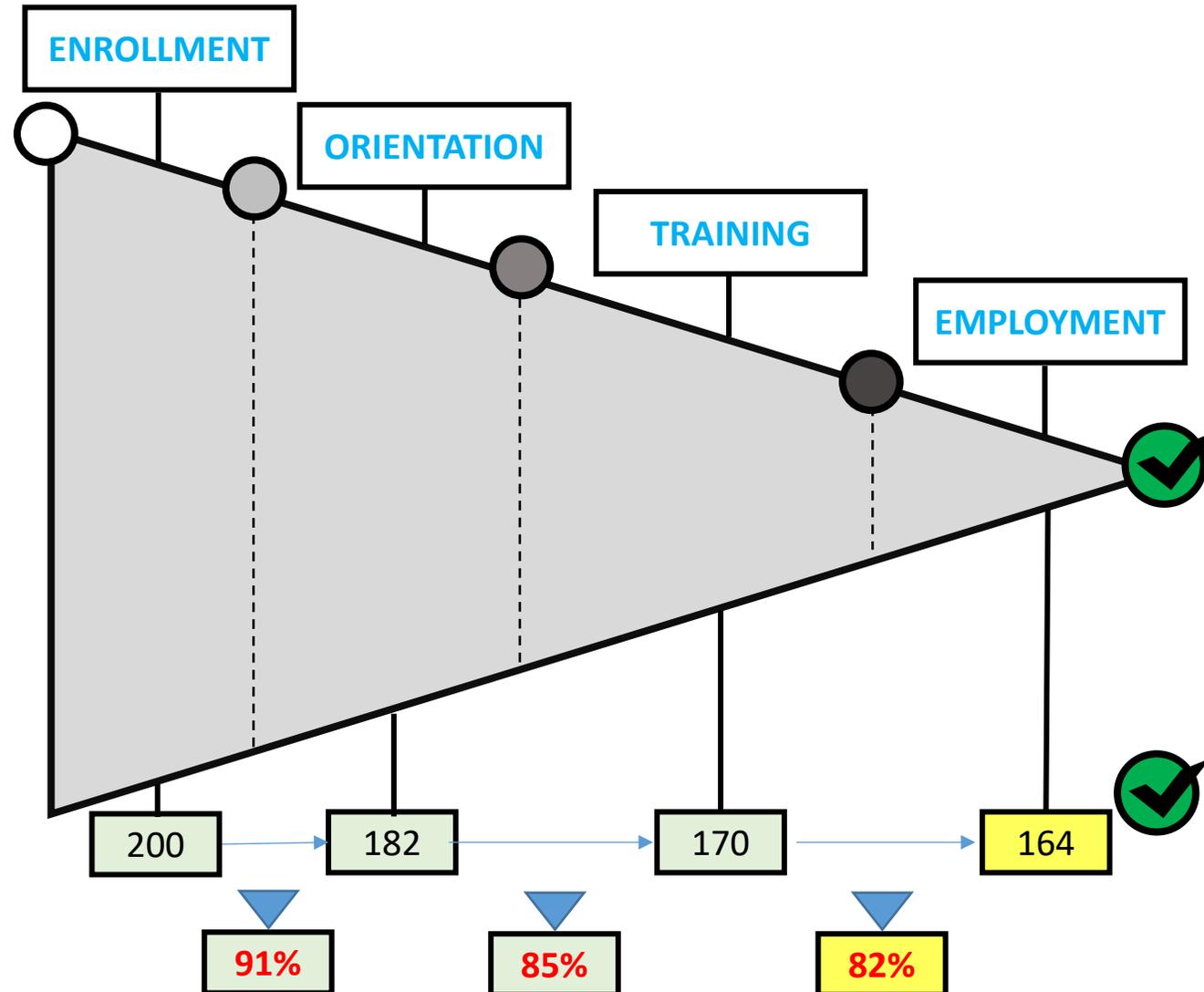
PERSONAS



Conversion Funnels for Greater Impact



Using Conversion Rates to Measure Impact



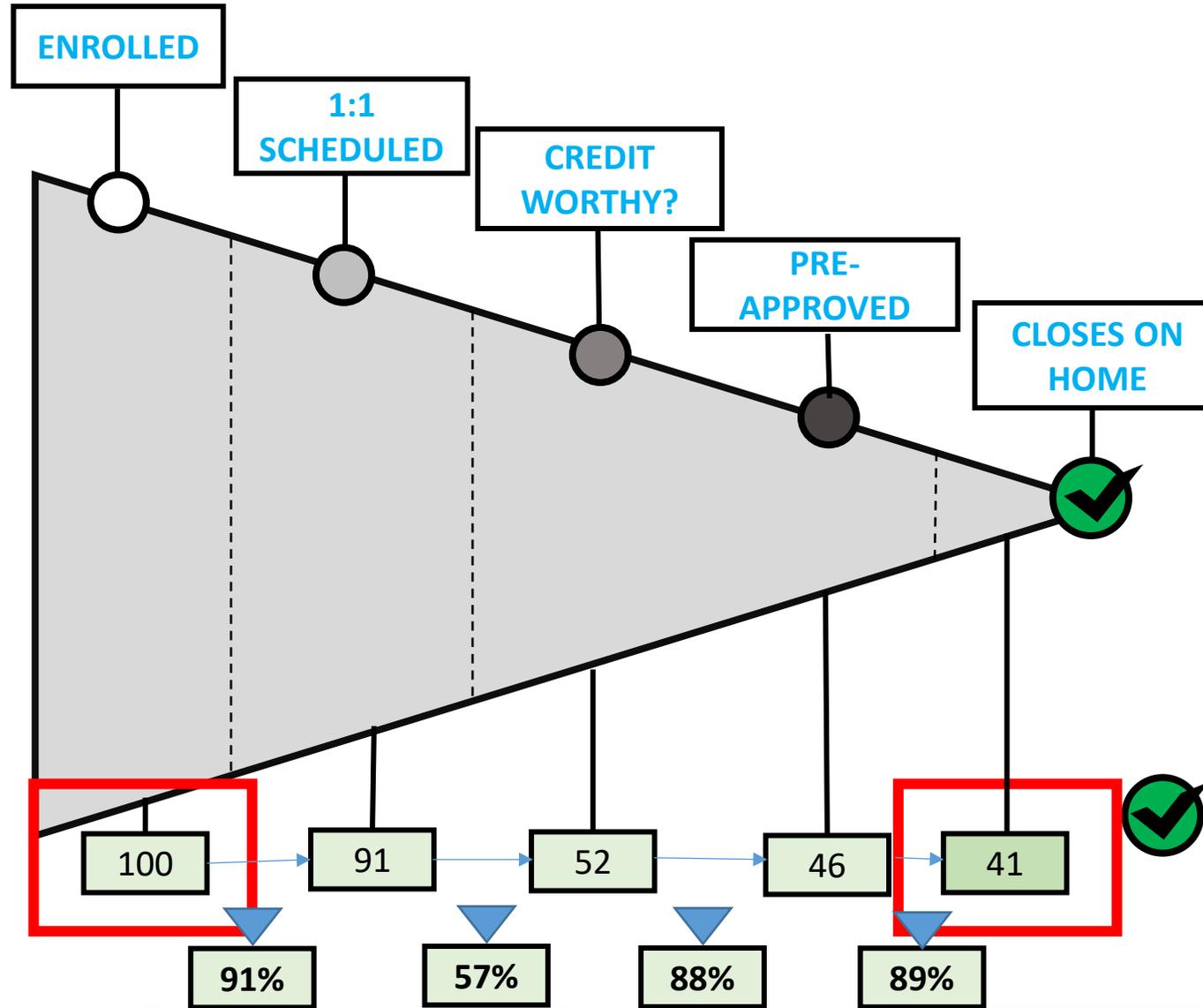
Example: First Time Homebuyer Program



OF THE 100 CLIENTS ENROLLED, 41 HAVE SUCCESSFULLY PURCHASED A HOME

Overall Program Conversion Rate of **41%**

...How might we go from ~41% to 50% or 60%?



Using the Toolkit to Generate Ideas for Impact

- **How we put the Design Toolkit into practice**
 - Prioritizing the Staff-Client Experience and Voice
 - Staff-Client *interaction* is our product, the resulting outcome is our *impact*.
 - Staff-Client *experience* is the design space that must be prioritized by the entire Chain of Command
- **Design Labs create the space and opportunity for staff to examine the staff-client experience**
 - The tools help them inventory and identify pain points and opportunities for enhancement, design iterative experiments and develop potential solutions.
- **Principle of starting small with new ideas**
 - Teams design “MVPs”-minimum viable products, to test their ideas with minimal resources to validate if they work
- **Teams conduct iterative sessions across the year**
 - Engaging management, department leaders and executives in the process to keep everyone connected to the Client experience and feedback

DISCUSSION TIME

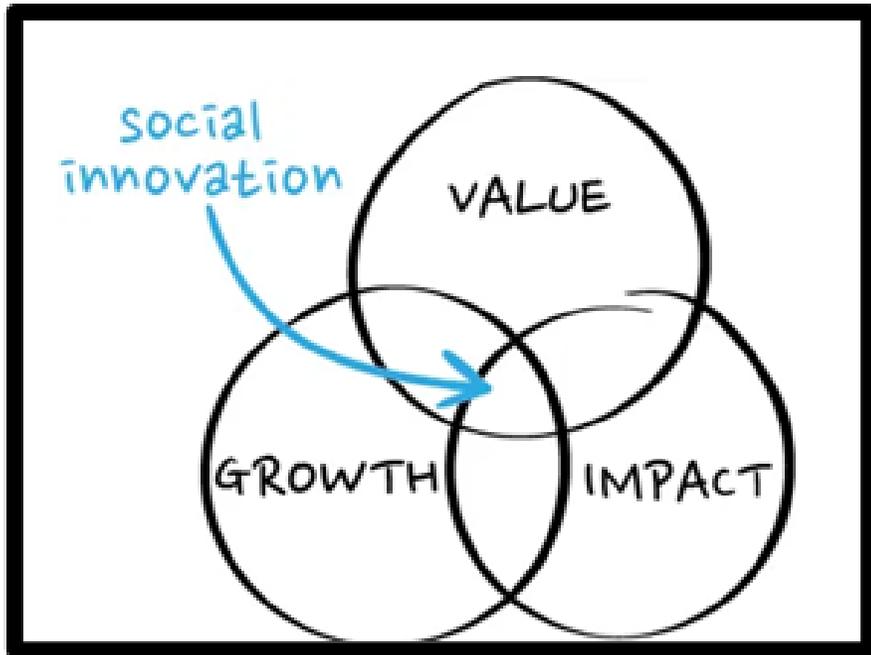
Discussion at Your Table

These are some examples of workstreams Congreso created in order to improve in each of the key Index areas, centered around the creation and launching of our homegrown Design Toolkit.

What are some ways that you could envision your organization launching design-focused initiatives in each area?

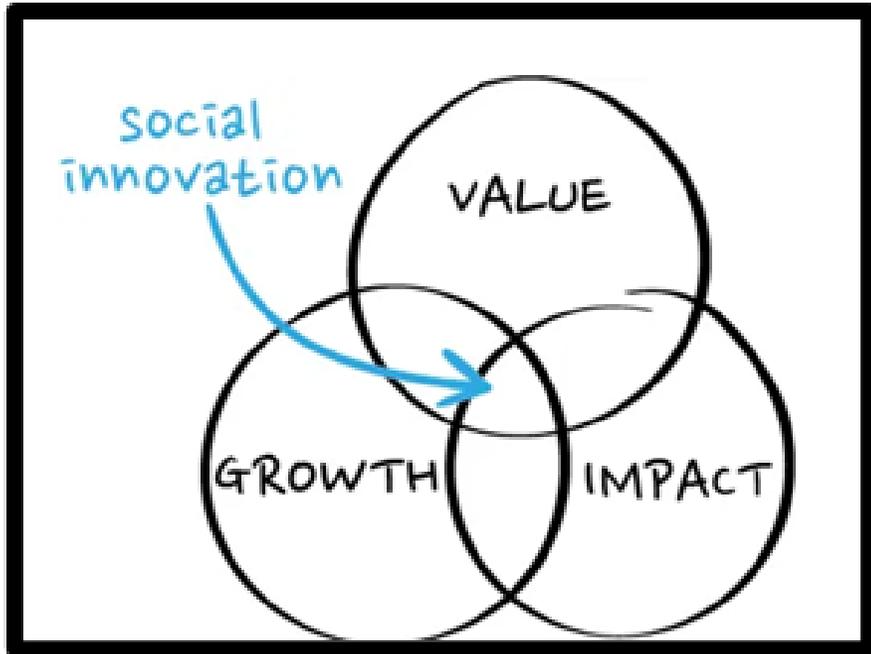
- Analytical Leadership
- Fostering Design Culture
- Mission Clarity
- Performance Management
- Resourcing and Managing Design

Design's Return on Investment (ROI)



- After investing in this journey of design and innovation we have seen significant Return on Investment (ROI) associated with increasing our score on the Index
- We use ROI in a different sense than the traditional “for-profit” meaning of solely increased dollars
- ROI in social services translates to focus on increased **IMPACT, VALUE and GROWTH** of our services and positive influence within our organization and the community we serve

Design's Return on Investment (ROI)



IMPACT – Does it really work?

- Does the service reliably fulfill its intended promise to clients? Increase successful conversion rates?

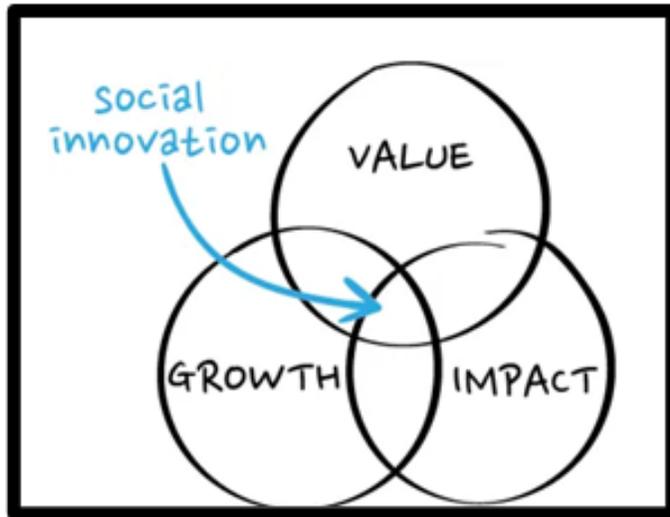
VALUE – Do people actually want it?

- Clients vote with their "feet", which means value is actually something we can measure
- Two aspects – client appetite for the service, and extent to which service produces customer delight

GROWTH/SCALE – Does it reach enough people to make a difference?

- **Container Math** – how many people in your catchment area experience the issue, vs. how many people your organization is able to enroll?
- **Increased Market Share**

CDL Trucking Program's Design Journey



GROWTH

- 2018 – 30 slots (1.5% Market Share)
- 2024 – 210 slots = 7X GROWTH! (10+% Market Share)

IMPACT

- 2018 – startup period, ~60% Credentialing Rate
- 2024 – Consistent ~90-95% Credentialing Rate, at 7X Scale

VALUE

- 2018 – Slow startup, ~60%/70% persistence rates, beginning stage trucking employer recruitment, only 1 driver training site
- 2024 – perpetual wait-list, 12+ "closed loop" employer partners, graduates becoming owner-operators and volunteering back at the program, sole CDL training provider for City of Philadelphia

ROI of Increasing Design Acumen

ORGANIZATIONAL IMPACT

- *"How might we?"* Culture
- **Staff retention** -Top Workplace Award, Social Innovation Awards, staff empowerment
- **Incorporation and usage of Design Toolkit** - in meeting spaces from bottom-up in "Design Labs" across different teams agency-wide
- **Efficiencies within programs** - mapping reduces duplicity of efforts, streamlines processes, empowers staff to see full picture and suggest ideas
- **Fundraising** -ability to advocate differently to funders with data, influence RFPs; ability to apply for more innovative grant applications

ROI of Increasing Design Acumen

Tools and Skills can be FREE, so don't wait to get started!

- **Promoting designerly behaviors** does not cost anything to start trying
- **Mapping** a program flow or an internal process on a whiteboard can lead to plenty of “how might we” conversations, just need markers and time!
- **Understanding personas** of who your organization serves can help inform design and program management conversations
- **Shift where ideas are generated from**, empowering team members and involving various stakeholders in solving collective design challenges, and feeding them up the chain of command for support. Bottom Up vs. Top Down...
- **Shifting our roles as leaders**- from risk management and compliance mindset to "stewards of innovative ideas"

How Might We Culture-Get Started

- **Consider taking the Index** with your leadership team to get a baseline on your organization's current capacity for design
- **Consider tightening up your organization's Theory of Change** and fortifying leadership's commitment to driving innovation
- Focus on design **"awareness, access and adoption"** in stages
- Encourage teams to schedule **Design Labs** to carve out intentional time for innovation, understand their personas and cultivate new ideas
- Leadership has **responsibility to steward resources** and respond to staff and client feedback to implement new ideas
- **Devote and increase resources** and budget towards innovation, including consultants, trainings, technology and experimentation

Things to Consider

WHERE IS **YOUR ORGANIZATION** in your journey toward building the capacity and culture for design and high performance?

- **How would raising your Design Index score and, building a culture of design and innovation** help you achieve your organization's performance and innovation goals?
- **What structural barriers** and aspects of your business model inhibit designerly behaviors from happening at your organization? How might you overcome them?
- **What measurement tools** do you need to have in place in order to measure the influence design has on performance? On Impact, Value, and Growth?
- **Who are your design champions** and early adopters across the agency and how do you engage them early in this process?

Design's Return on Investment



CONGRESO'S FY24 IMPACT:

- **13,600** unique clients served overall
- **11,628** clients enrolled in full-dosage programs
- **9,034 (78%)** reached a concrete **Milestone** outcome
 - **Examples** – Attained Industry-Recognized Certification, Secured Mortgage Pre-Approval to Buy a Home, On-Time Grade Promotion in K-12, etc.
- **5,530 (53%)** fully completed services and successfully exited Congreso programs by reaching an **Indicator** outcome
 - **Examples** - Obtained a HS Diploma or GED, Purchased a Home, Employed Above the Living Wage, Attained a College Degree, etc...

One Final Note

If you're in the **Service Delivery** Business, you're in the **Service *Design*** Business, whether you realize it or not.

Consider giving **Human-Centered Design** a try!

THANK YOU!

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In partnership with UnidosUS

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ADDITIONAL RESOURCES:

Lean Startup book: <https://www.amazon.com/Lean-Startup-Entrepreneurs-Continuous-Innovation/dp/0307887898>

Lean Impact book: https://www.amazon.com/Lean-Impact-Innovate-Radically-Greater/dp/1119506603/ref=sr_1_1?crid=2X21G95C8V580&keywords=lean+impact&qid=1682530660&s=books&sprefix=lean+impact%2Cstripbooks%2C93&sr=1-1

McKinsey Design Index: <https://solutions.mckinsey.com/design-index/>