

Enabling Organizational Decision-Making Through a Data-Driven Approach

In continuing our commitment to making a difference at the community level, FTI Consulting recently partnered with United South End Settlements (USES), a Boston-based non-profit organization, which offers programming to support the whole family to achieve economic mobility.

Introducing FTI Consulting's Project with USES

Most recently, a team of FTI Consulting's Corporate Finance and Data Analytics professionals collaborated with USES, a Boston-based non-profit group offering adult and youth programming to equip individuals with the resources they need to achieve economic mobility. Through a pro bono project, we partnered with USES to provide the organization with an interactive data model to make strategic program decisions.

FTI Consulting focused on three key areas for the project scope:

1. Develop a dynamic data visualization tool to contextualize existing participant data, enhance program participation and track donor insights
2. Assess current surveys and accumulated survey data to determine their effectiveness in measuring program impact
3. Identify organizational pain points through stakeholder interviews, outline how they have impacted program operations and propose a new reporting structure across programs to clarify communication streams and realize synergies

At FTI Consulting, we view our relationship with the non-profit organizations we work with to be an ongoing partnership, where both organizations will benefit from continuing to engage with one another, even after the project work is completed. With that in mind, we asked CEO Jerrell Cox and USES' Chief of Staff Melody Valdes to reflect on the project and answer a few key questions about how the organization is moving forward.



JERRELL COX

Chief Executive Officer

From 2012 to 2018, Jerrell successfully implemented a program model that provided access to summer opportunities, for over 220 youth. Additionally, he launched a capital campaign aimed to match the program site to the quality of services provided. Over a two-year period, he secured \$5.6 million for capital improvements to Camp Hale, ensuring the camp's legacy for the foreseeable future. In 2020, Jerrell was promoted to Vice President of Development and External Relations, where he secured the resources needed to provide innovative, top-quality programming to children and their families. Now, in his role as Chief Executive Officer, Jerrell sets the vision and strategy for positioning United South End Settlements as the preeminent community-based organization in the Boston area.

Question & Answer with USES Leadership

What underlying philosophies or values guide USES?

Jerrell: USES' mission is to harness the power of our diverse community to disrupt the cycle of poverty for children and their families. We believe that as families stabilize through access to increased resources, become more resilient and build a diverse network of relationships, they and their children are more likely to develop the skills they need to succeed and break the cycle of poverty.

What are your goals for each of your programs (e.g., Early Childhood Education (ECE), club48, Family Mobility, etc.)?

Melody: Obviously, 2021 presented unique challenges to the organization. Our main priority has been, and continues to be, focused on effectively managing the impact of COVID-19 on our mission, our overall impact, our people (staff and participants), and ensuring that our organization continues to offer the highest quality of programs and services possible. In general, regardless of the program, our primary goal is to break the cycles of generational poverty and build social capital. To do this, we must ensure that the organization is delivering at a high level and the profile of the organization is known throughout the community at large, and that we continue to maintain financial sustainability. Of course, at the individual program level, we have nuanced goals that our teams are aiming to achieve. For example, in our Family Mobility programming, our goal is that 75% of our families will see improvement in one or more of the following: increased earnings by 20%, reduced overall debt, improved credit and increased savings. For the children in our programs (i.e., ECE, club 48, Camp Hale), we administer assessments on individual performance and development. Our goal is to see growth in key developmental milestones, especially for infants, toddlers, and preschool-age children who participate in our ECE programming.



MELODY VALDES

Chief of Staff

After graduating from the University of Pennsylvania with a degree in Psychology, Melody briefly pursued an opportunity in the for-profit sector as a paralegal at a corporate law firm in New York City. Her first role in a non-profit was as a teacher in USES' Early Childhood Education program. This opportunity allowed her to understand firsthand the impact of high-quality education on children's development and the challenges many families face to access care. As Chief of Staff, Melody is primarily responsible for providing administrative and operational leadership to the Executive team while overseeing Family Mobility programming. Working closely with all facets of the organization (e.g., Board of Directors, Senior team, Executive team), Melody supports strategy around USES's mission, vision and outcomes.

What was the outcome of the work with FTI Consulting and how does USES plan to leverage the data and dashboards to support their goals?

Melody: FTI Consulting built a series of dynamic visualizations highlighting internal and external datasets in Tableau. By better understanding the demographics of the city of Boston and the environment in which USES constituents live, (e.g., poverty rates by neighborhood, academic outcomes in the Boston public schools), USES can use this data to shift programming focus to address unique economic barriers facing parents and best equip students with needed academic support to lead to long-term increases in academic and career outcomes.

Were there any unexpected or surprising learnings that this project uncovered?

Jerrell: The most surprising findings aligned with our Development Dashboard, specifically around giving. We learned that our donors had their best gift year between 2018 and 2021 and that most donors' first gift is the same as their best gift. These findings will, in turn, inform our fundraising and cultivating strategies.

What are some of the biggest challenges you face as an organization?

Jerrell: The challenge looming over many organizations like ours is the ongoing uncertainty surrounding COVID-19. Each new variant is a reminder that this pandemic is not over. While we are optimistic that further large-scale shutdowns will not be necessary, we must remain prepared for any possibility. COVID-19 will continue to disproportionately impact low-income communities and communities of color. We will continue to work to address this injustice however it manifests and for as long as it persists.

Additionally, like many other organizations, staffing has been a significant challenge this year. Throughout the pandemic, workers at schools, healthcare facilities and community-facing organizations like ours showed remarkable resilience as they continued to show up day after day in the face of great hardship and personal risk. The hard truth is that our ability to compensate staff is not commensurate with what is being asked of them, and the result has been continued difficulty filling vacant staff positions. This challenge speaks to a persistent injustice that must be addressed by dramatically reconsidering how we fund the social services sector.

With that in mind, financial sustainability remains a challenge for our organization and, while we are confident in our progress, we have seen how progress can be slowed by external factors.

How can other corporations and individuals in the community become more involved with USES?

Jerrell: Individuals and organizations can join the USES community through volunteering, engaging our board and donating to our programs and services. At USES, we thrive when we partner with our community towards change.

Looking forward, what is USES's strategy in the coming years?

Jerrell: We believe that the implementation of our two-generation model is critical for engaging families. For us, two-generation means working with both parents and children in the family dynamic. We believe that this is the most effective approach to meaningfully disrupt generational poverty for families over the long term based on substantial research and the early results from our programs. Entering our next strategic plan, we reaffirm our commitment to our theory of change and aim to refine this model. The accessibility of our programs is critical to our mission: While we rely on earned income through program fees, it is paramount that we continue to serve low- and moderate-income families primarily. Finally, we will keep working to ensure our staff and leadership are well-supported and reflect the lived experiences of the community we work with.

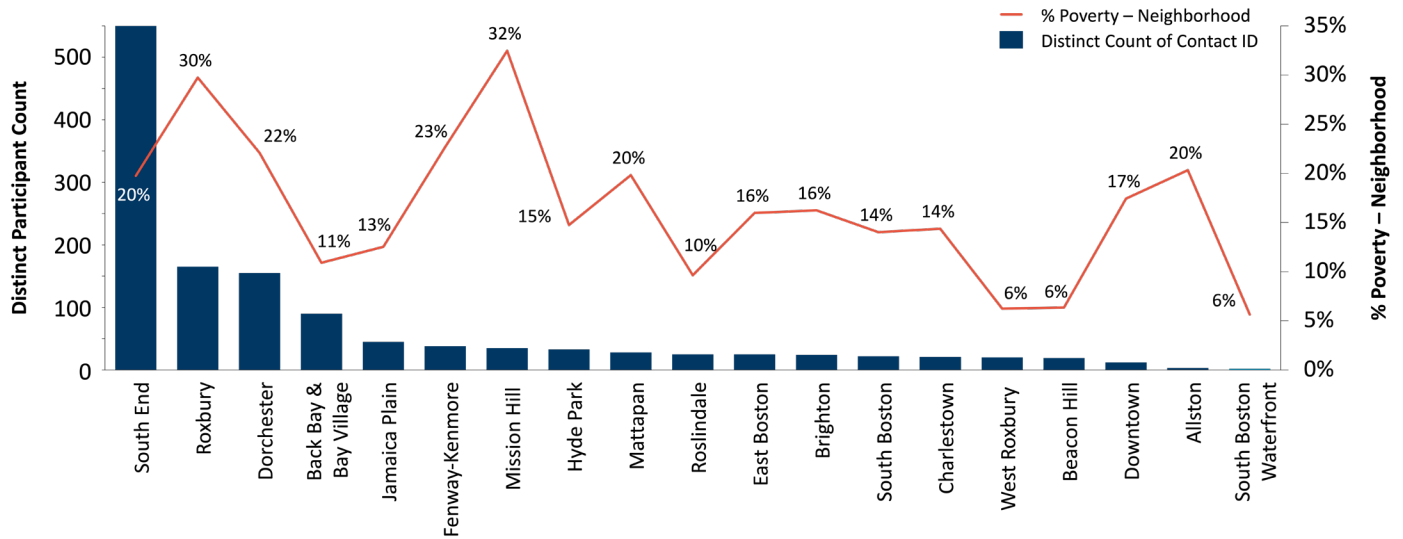
Putting in Context the Importance of Organizations like USES

USES is focused on providing tools for economic mobility to families of high-need communities as well as academic and resource-based programming to youth participants.

FTI Consulting's work with USES armed the organization with a comprehensive, dynamic data model that allows USES leadership to better understand the full breadth of the data they collect, highlight areas of excellence to celebrate and identify areas of additional need. Throughout the engagement, we saw USES' footprint very clearly in Boston's more disadvantaged neighborhoods.

Among the insights that FTI Consulting provided, Exhibit #1 demonstrates that the majority of USES participants reside in the South End and Roxbury neighborhoods, two high-need Boston neighborhoods with above-average poverty rates. In Exhibit #2, the schools that participants are attending are in neighborhoods with, on average, lower-performance. Even within the neighborhoods, we saw that USES youth participants were attending schools that were underperforming compared to their neighborhood average.

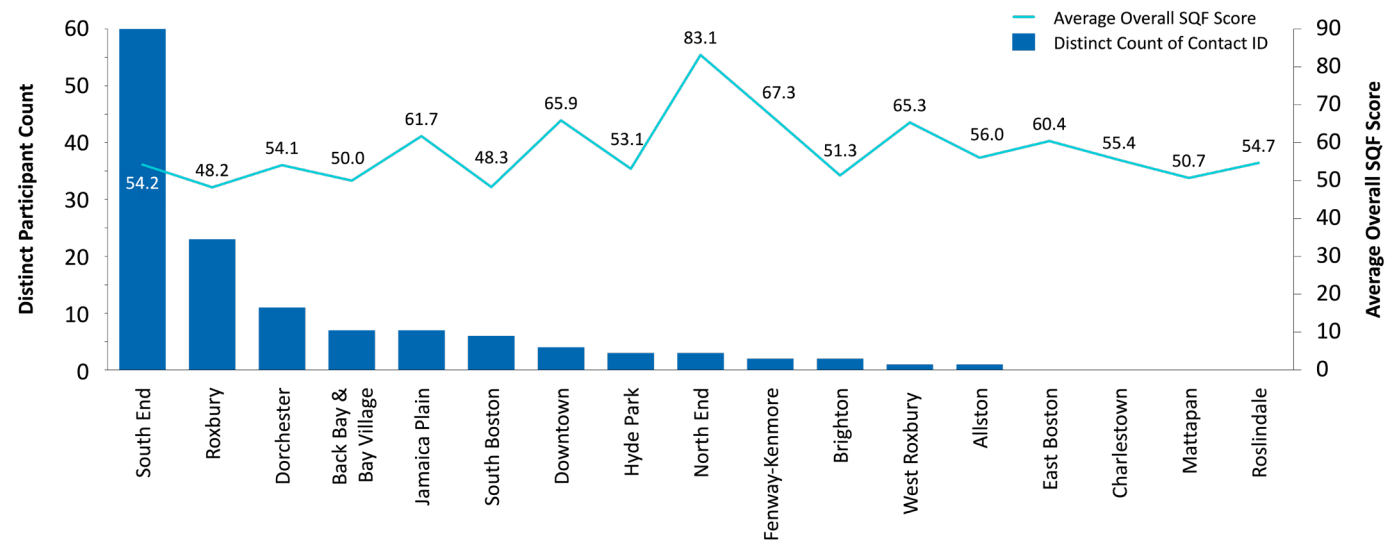
Exhibit #1 Poverty % by Boston Neighborhood



Source: USES, City of Boston

Another visual outlined the relative academic need of USES participants. The schools that participants are attending are in neighborhoods with, on average, lower-performing schools. Even within the neighborhoods, we saw that USES youth participants were attending schools that were lower performance compared to their neighborhood average.

Exhibit #2 Average School Quality Framework Score (SQF) by Boston Neighborhood



Source: USES, Boston Public Schools

The graphs above are just two examples of data visualizations our team built for USES. Beyond these examples, the team focused on helping the organization contextualize the results of surveys that were administered to program participants, with the goal to provide administrators with dynamic, near real-time feedback on areas of strength or relative weakness of the overall effectiveness of programs. These visualizations allow for filtering on different population types to compare feedback

and overall performance of a subset of participants against the entire population. Finally, by connecting to the organization’s Salesforce database, FTI Consulting was able to access donor accounts, which delineated trends on an annualized basis and provided context into the types of donors that were most likely to give more. As outlined by USES’ management team, one finding was that for most donors, their first gift was usually their best gift. However, for the subset of donors that give more than twenty times during their lifetime, the median gift amount tends to spike significantly (between 2.5x – 3.0x), indicating a clear value in developing donor relationships over time (at least with strategic donors who are most likely to develop a lasting relationship with the organization). Across the dashboards, all organization-specific data relied on connecting Tableau to the data source, allowing for visualizations that updated based on the most recent inputs across the organization.

FTI Consulting contextualized the needs of the constituents USES serves relative to the rest of the City of Boston. By leveraging third-party, publicly available city data, in practice, this allows USES to effectively tell their story to relevant stakeholders, and proactively identify gaps in their services by potentially identifying additional areas of need within the broader community. Additionally, focusing on reviewing survey results provides staff a tool to evaluate programming, and helps to ensure that solutions are being effectively tailored to participant needs. Finally, insights on donations will aim to help USES further grow their revenue streams, which will both positively impact existing participants and aid the organization’s ability to expand as their strategy dictates. From this perspective, each of these inputs drives critical aspects of USES’ overall effectiveness, and the insights from one dashboard will clearly impact the ability to evolve in other critical areas.

USES’ mission and value of providing essential developmental support to residents in Boston who need it the most was made even more clear by our team providing data-driven insights. Through our partnership, our team helped USES showcase their impact and illustrate where more resources are needed to further engage communities that need their support. While USES has faced great and unexpected challenges since the onset of the pandemic, they continue to persevere as they work to bridge the opportunity gap and disrupt the poverty cycle for households most in need.

Additional Information on United South End Settlements

Founded as one of Boston’s first settlement houses in 1892, USES has a strong history of providing critical services to youth and families in the South End and Boston. It is with an awareness of USES’ roots and the complexities of poverty that they identified a renewed mission in 2017, pivoting their focus to comprehensive programs that support the whole family.¹ Today, their mission is to harness the power of their diverse community to disrupt the cycle of poverty for children and their families. USES provides children with quality education and enrichment opportunities through Early Childhood Education, club48 after-school programming and a summer sleepaway camp in New Hampshire. At the same time, they equip parents and caregivers with the tools to leverage available public benefits, pursue financial and professional goals and strengthen community connections through supportive coaching partnerships and services within their Family Mobility program.

1. “Our History”, United South End Settlements. <https://www.uses.org/>

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