Actionable Resources for Change in Violence Intervention

Temple University College of Liberal Arts | Public Policy Lab

Quick Guide: An Example Data Scorecard for CVI Outreach and Referral

This ARCvi Quick Guide responds to the frequently asked question: What should a simple data scorecard look like for outreach, engagement and referral?

A scorecard is a concise snapshot of key performance measures that program leaders can review regularly to understand how the program is operating. Rather than displaying every piece of data collected, it highlights measures useful for spotting patterns, identifying gaps, and guiding action. A scorecard for referral, outreach, and engagement might show whether referrals are being reached, whether the intended population is entering the program, and where people are lost before enrollment or full engagement with the program.

The example below is distilled from the outreach, recruitment, eligibility, orientation, and entry measures used in Pushing Progress Philly (P3), a community violence intervention program designed to replicate the READI Chicago model that serves young Black men at the highest risk of violence perpetration or victimization. These measures below can be considered “core” measures; the P3 data system tracks many additional activities and processes related to outreach, engagement and referral.

A note on adapting measures: Performance measurement is highly context specific. The measures in this Quick Guide are examples, not a universal set every program should adopt. Programs should select measures that reflect their goals, services, participants, staffing, and local context. Measures should also be culturally responsive, appropriate, and meaningful to the program and community it serves. Program leaders/staff, participants, and integral community partners should be the predominant voice in deciding what matters to measure and how success is defined.

What should staff track for each referral?

Stage	Core data to record	Why it matters
Referral	Referral date; source; participant identifier	Defines the pool the program attempted to reach and where referrals are coming from.
Outreach	Date of each outreach attempt; whether contact was successful	Shows whether referrals are being actively pursued and reached.
Engagement	Date of first successful contact; participation in required orientation/engagement step(s)	Shows whether initial contact is turning into meaningful engagement.
Eligibility/fit	Eligibility decision; priority/risk category; reason not eligible	Shows whether the program is reaching the population it was designed to serve.
Entry	Intake date; warm handoff, if used; enrollment/acceptance status	Shows whether an engaged, eligible referral actually enters the program.
Exit before enrollment	Pre-entry exit type: Unable to reach; declined; ineligible; referred elsewhere; other	Shows why people leave the pipeline before enrollment.

The basic approach: record events as they happen, summarize them at regular intervals

Frontline staff should enter a small number of key data elements whenever a referral is received, outreach occurs, eligibility is determined, or a participant completes an entry step. The data system can then turn those records into weekly, monthly, bi-annual and annual measures. This allows leaders to examine overall performance and, when useful, differences across outreach workers/staff, referral sources, or participant groups.

Keep scorecard modality simple. P3 separately counts calls, texts, and emails. Staff can still record the mode of contact in the database, but scorecards can combine them into one measure: total outreach attempts.

When developing your scorecard, don't forget to ask your peer programs to share measures and lessons learned!

A core monthly outreach and entry scorecard

A practical scorecard could focus on the measures below. Together, they show the size of the referral pool, outreach effort, success in making contact, fit with the target population, movement through entry steps, and the speed of the process.

Core measure	How to calculate it	What it tells you
1. Referrals received	Count of new referrals during the month	How many people entered the recruitment pipeline via referrals
2. Potential participants identified through proactive outreach	Count of new individuals identified by outreach workers during community-based outreach who may fit the program's target population	How much of the program's recruitment pipeline is generated directly through outreach workers rather than referrals
3. Proactive engagement rate	% of outreach-identified potential participants who have a substantive follow-up contact or agree to continue engagement	Whether initial street- or community-based contacts are developing into ongoing relationships with potential participants
4. Successful contact rate for referrals	% of referred potential participants with at least one successful contact.	Whether outreach efforts are reaching referred participants
5. Outreach intensity	Average outreach attempts per referral before contact, enrollment, or closure	How much effort is required to engage referrals and whether workloads are realistic
6. Eligibility/target-population fit	% of assessed potential participants meeting eligibility	Whether referral sources are sending people the program was designed to serve
7. Entry-step completion	% of eligible potential participants completing required orientation, warm-up, or other pre-enrollment step(s)	Where engagement may be dropping off before intake
8. Enrollment conversion	% of eligible participants who complete intake and enroll	How often eligible referrals become active participants
9. Referral-to-contact time	Median days from referral to first successful contact	How quickly the program responds to referrals
10. Time from referral/first outreach contact to enrollment	Median days from referral or substantive outreach contact to completed intake/enrollment	Whether the entry process is moving quickly enough
11. Pre-enrollment closure reasons	% unable to reach, declined, ineligible, referred elsewhere, or other	Why people are leaving the pipeline and what may need attention

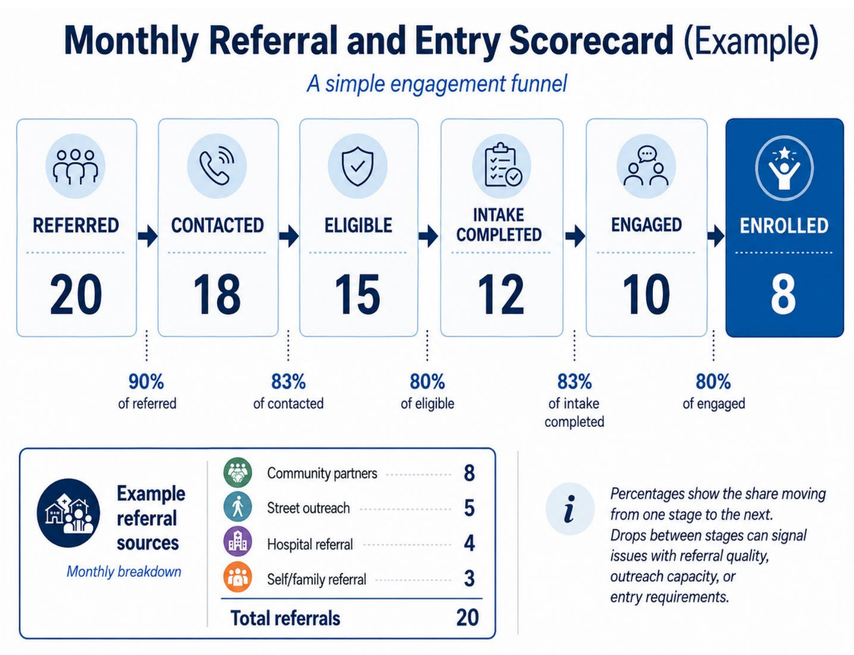
What about outreach that begins in the community rather than with a referral?

Not all CVI outreach begins with a formal referral. In many programs, outreach workers/credible messengers identify and engage potential participants through their regular presence in the community, relying on community relationships and informal networks, and approaching people who may benefit from the program. Programs should capture this work (number of potential participants identified through proactive outreach) even when the person never becomes a formal referral or participant.

Programs can then distinguish participants who enter through formal referrals from those identified directly by outreach workers. This helps program leaders understand how much of their participant pipeline is being generated through workers' community-based outreach rather than through outside referral partners.

Avoid treating the raw number of people contacted as the main measure of outreach worker performance. Effective outreach depends on building relationships with people at highest risk, which can take repeated contacts over time. **Measures of outreach volume are most useful when paired with measures of who is being reached and whether those relationships progress toward meaningful engagement.**

Think of the scorecard as a simple engagement funnel



The scorecard should show both the number of people who reach each stage and the percentage who move from one stage to the next. A decline between stages can signal where closer examination may be warranted—for example, whether referrals are reaching the intended population, outreach capacity is sufficient, or entry requirements are creating unnecessary delays or barriers. Scorecard data can also be translated into clear visual displays that support staff review, program improvement, strategic planning, grant applications, funder reporting, and external communication about program reach and impact.

For additional scorecards and resources to strengthen performance measurement and data use in your CVI program, see ARCvi.org's Resource Collection: ***Using Data that Matters***

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