

TECHNICAL MANUAL

BRIDGES/GETTING AHEAD MODEL

BRIDGES/GETTING AHEAD MODEL FIDELITY SCALE

and

BRIDGES/GETTING AHEAD OUTCOME INDICATORS SCALE

Revised September 2007

William W. Swan, Ed.D.
Professor Emeritus, The University of Georgia
and
CEO, Educational Leadership Associates, Inc.

Copyright © 2007 aha! Process, Inc. All rights reserved.

www.ahaprocess.com

Published by aha! Process, Inc.

TABLE OF CONTENTS

	<u>Page</u>
Introduction and Background— <i>Bridges Out of Poverty/Getting Ahead in a Just-Gettin’-By World</i>	3
<i>Bridges/Getting Ahead Model Fidelity Scale</i>	4
Rationale.	4
Development.	5
Reliability.	7
<i>Bridges/Getting Ahead Outcome Indicators Scale</i>	7
Rationale.	8
Development.	8
Addendum (2007).	10
References.	12
Appendices.	13
Appendix I: <i>Bridges/Getting Ahead Model Fidelity Scale</i>	13
Appendix II: Instructions for <i>Bridges/Getting Ahead Model Fidelity Scale</i>	15
Appendix III: <i>Bridges/Getting Ahead Outcomes Indicators Scale</i>	21
Appendix III-A: Content Validity for <i>Bridges/Getting Ahead Outcomes Indicators Scale</i>	21
Appendix III-B: <i>Bridges/Getting Ahead Outcome Indicators Scale</i>	31
Appendix III-C: Instructions for <i>Bridges/Getting Ahead Outcome Indicators Scale</i>	37
Appendix IV: Updated Materials (Addendum 2007).	39
Appendix IV-A: <i>Bridges/Getting Ahead Model Fidelity Scale (Updated)</i>	39
Appendix IV-B: Guidelines for Conducting <i>Getting Ahead in a Just-Gettin’-By World</i>	41

Introduction and Background

In *Bridges Out of Poverty: Strategies for Professionals and Communities* (2001, second revision in 2006), Dr. Ruby K. Payne, Philip E. DeVol, and Terie Dreussi Smith provide a new lens for adult readers—in particular community leaders from all disciplines—to start on the path to view themselves, their clients, and their communities as they develop accurate mental models of poverty, middle class, and wealth (p. 6). Their purpose is to improve the lives of people in poverty and help make sustainable communities in which everyone can do well (p. 5).

The research upon which the *Bridges/Getting Ahead Model* is founded (pp. 231–261) is based in large part on Dr. Payne’s 30-year longitudinal, qualitative, and ongoing anthropological, analytical case-study approach using multiple sources and disciplines to research patterns in different economic realities and interventions. This research culminated in the development of the book *A Framework for Understanding Poverty* (Payne, 1996, fourth revision in 2005), which articulates a model for serving infants, children, and youths from poverty. In addition to synthesizing the research of such scholars as Reuven Feuerstein, Lee Shulman, Martin Joos, Maria Montano-Harmon, James Comer, Paulo Freire, John McKnight, Robert Putnam, William Miller, Stanley Greenspan, Betty Hart, and Todd Risley, the *Bridges/Getting Ahead Model* incorporates additional research on adults and communities regarding such topics as finance and economic development, equity, family life, adult development, adult resiliency and vulnerabilities, teaching adults, managing in a time of change, and the additive model—the aha! Process approach to building sustainable communities.

In *Bridges Out of Poverty*, Payne, DeVol, and Dreussi Smith articulate 12 key points to remember and consider when working with people in generational poverty:

1. Poverty is relative.
2. Poverty occurs in all races and in all countries.
3. Economic class is a continuous line, not a clear-cut distinction.
4. Generational poverty and situational poverty are different.
5. This work is based on patterns. All patterns have exceptions.
6. An individual brings with him/her the hidden rules of the class in which he/she was raised.
7. Schools and businesses operate from middle-class norms and use the hidden rules of middle class.
8. For our clients to be successful, we must understand their hidden rules and teach them the rules that will make them successful at school, at work, and in the community.
9. We can neither excuse persons from poverty nor scold them for not knowing; as professionals we must teach them and provide support, insistence, and expectations.
10. In order to move from poverty to middle class or middle class to wealth, an individual must give up relationships for achievement (at least for some period of time).

11. We cannot blame the victims of poverty for being in poverty.
12. We cannot continue to support stereotypes and prejudices about the poor (pp. 6–8).

The *Bridges/Getting Ahead Model* defines poverty as “the extent to which an individual does without resources” (p. 11) based on nine resources: Financial, Emotional, Mental, Spiritual, Physical, Support Systems, Relationships/Role Models, Knowledge of Hidden Rules, and Coping Strategies. Specific chapters provide strategies and practices, with examples of implementation on hidden rules among classes; patterns in generational poverty; role models and emotional resources; support systems; mentoring and bridging; discipline, choices, and consequences; resources and resiliency: internal assets; improving work performance: teaching what is needed to do the job; creating relationships with people in poverty; developing personal skills for working with people in poverty; improving agency policies and internal processes; improving interagency collaboration; and addiction, treatment, and recovery.

Getting Ahead in a Just-Gettin’-By World: Building Your Resources for a Better Life (DeVol, 2004, first revision in 2006) is a workbook for people in poverty. Working with one or two facilitators, groups of 10–12 adults create a mental model of poverty and analyze the impact of poverty on themselves and the community. Participants examine research on the causes of poverty, learn how to use the hidden rules of class, conduct a self-assessment of their own resources, and develop a plan to stabilize their environment and build resources. In *Getting Ahead*, 11 resources rather than nine, are introduced and used in the self-assessment. Three new resources are added: Language, Integrity and Trust, Motivation and Persistence. One resource, Coping Strategies, is dropped from the list but woven into Emotional Resources. The change in the list of resources comes in one case from participants of a Getting Ahead group. They advised adding Language to the resources. Integrity/Trust and Motivation/Persistence were adapted from *Hidden Rules of Class at Work*. (Payne, Krabill, 2002). Participants share the results of their community assessments with the community and participate in solving community problems.

The *Bridges/Getting Ahead Model* is being implemented in a variety of agencies/communities in multiple states to improve the lives of people in poverty and help make sustainable communities in which everyone can do well (p. 5). The structure for providing training is foundational workshops and technical assistance provided by selected consultants from aha! Process. Two instruments have been developed—one for determining the level of implementation of the approach (model fidelity) and one for determining the improvements in the lives of people in poverty (outcomes) in the communities/agencies that participated in the training.

Bridges/Getting Ahead Model Fidelity Scale

Rationale

Federal legislation (e.g., Welfare Reform Act of 1996, Deficit Reduction Act of 2005) and taxpayer expectations have shifted the paradigm for examining the

effectiveness of programs (e.g., models) by focusing on the outcomes of participants. The new standard requires “research based” evidence to demonstrate improved performance by those participating in programs sponsored by governmental entities, as well as in programs sponsored by providers of social services, healthcare, and behavioral healthcare. The varied professional disciplines also have recognized the need for accountability focusing on both the effective implementation of models (model fidelity) and the behavioral outcomes of participants.

The determination of the level of model fidelity (i.e., the degree to which a model is being implemented effectively) is essential in determining whether the participant outcomes are related to the implementation of the model. For example, if model fidelity is low, participant outcomes would be anticipated to be the same as before the implementation of the model. If model fidelity is high, participant outcomes would be anticipated to be higher after the implementation of the model.

Development

There were two purposes for the development of a model-fidelity instrument for the *Bridges/Getting Ahead Model*: (1) to provide technical guidance to agency leaders and personnel in the implementation of the key model components and (2) to assist in determining the level of fidelity in implementing the model in sites receiving technical assistance and participating in collaborative research with aha! Process.

Validity. The *Bridges/Getting Ahead Model Fidelity Scale* was developed in 2005 by DeVol and an external consultant who guided the process. The publications, training materials, and technical-assistance materials based on the *Bridges/Getting Ahead Model* were used as the sources for selecting key indicators of essential aspects of the model. The scale is criterion-referenced to the materials in these publications and thus has content validity.

Initial Draft. In like manner to the paragraph above, the first draft of the *Bridges/Getting Ahead Model Fidelity Scale* was developed in 2005 by DeVol and an external consultant who guided the process. The initial instrument was composed of 47 indicators in six components: Bridges Day One (n=7), Bridges Overview (n=3), Applying the Concepts (n=11), Design/Redesign (n=8), Getting Ahead Facilitator Training (n=14), and Getting Ahead Workgroups (n=4). The first draft used a two-component rating scale. The first scale was labeled “Training/Technical Assistance” with a “Yes”/“No” rating to indicate if training/technical assistance had been provided. The second was labeled “Met Standard” with four levels (1=No Action; 2=Initiated but Not Achieved; 3=Achieved; and 4=Maintained over Time). The second focused on the level of implementation of each of the key indicators of the model implementation.

The first draft was reviewed by an expert panel, including DeVol, Jodi Pfarr, and Dreussi Smith. The following changes were recommended:

- Reorder the Bridges Day One and the Bridges Overview components, putting the Overview first and Day One second, consistent with the planned implementation for training/technical assistance.
- Reword the “Acts as mentor when appropriate” to “Provides follow-up and support for change” in the Applying the Concepts component in order to focus on observable behaviors.
- Eliminate the “Others—to be named” indicator in the Design/Redesign component, as no other indicators were identified.
- Eliminate “Trusts group process,” “Uses self-disclosure appropriately,” “Uses adult voice,” “Works effectively as someone from the dominant culture,” “Does not judge participants,” “Does not do what the learner can do,” and “Does not decide what the learner can decide” in the Getting Ahead Facilitator Training component for a combination of the following criteria for inclusion of the item in the instrument: Must be based on observable behavior, must be a desirable (positive) behavior, and may or may not be a representative from the dominant culture.
- The “Works well with co-facilitator” indicator was reworded to “Works well with a co-facilitator who was a former group participant” in order to emphasize the model’s priority on including people from poverty in the training experiences.
- Underline each of the items to improve the ease of scoring each item.

Final Instrument: The final instrument (2005; see Appendix I) was shorter (40 items rather than 47 and two pages rather than three) and judged easier to use. It was composed of 40 indicators in the same six components as the first draft: Bridges Overview (n=3), Bridges Day One (n=7), Applying the Concepts (n=11), Design/Redesign (n=8), Getting Ahead Facilitator Training (n=7), and Getting Ahead Workgroups (n=4). Each indicator was also underlined to improve the ease of scoring. Additionally, a set of instructions (2006; see Appendix II) was developed to increase accuracy and consistency across raters. The instructions include the following topics:

- Who is to conduct the Fidelity Scale
- Data collection
- When/frequency
- Reports
- Who is to be assessed
- Instructions for header
- Instructions for “Provided Yes/No.”
- Instructions for “Meeting Standard” section (includes descriptions of critical indicators and sources for information/data):
 - Instructions for Bridges Overview
 - Instructions for Bridges Day One
 - Instructions for Applying the Concepts
 - Instructions for Design/Redesign
 - Instructions for Getting Ahead Facilitator Training
 - Instructions for Getting Ahead Workshops

This version (2005) was pilot-tested in selected sites in 2005 by DeVol and Dreussi Smith to evaluate its versatility in varied settings, its ease of use, and its consistency across multiple raters. It was determined that this version of the *Bridges/Getting Ahead Model Fidelity Scale* was sufficiently versatile, reasonably easy to use, and provided sufficient consistency across raters.

Reliability

In 2006 two individuals were involved in establishing the reliability of this instrument. Both are certified trainers for the *Bridges/Getting Ahead Model* and are responsible for technical assistance and training for implementing the model. Observations were conducted in three different model implementation sites with a total of five individuals.

Two measurement approaches were used to determine the reliability of the instruments—percentage agreement for inter-rater reliability using individual components and for the instrument as a whole. These two approaches were used because the implementation of the model was individualized for each site.

The reliability estimates are contained in Table 1.

Table 1
Reliability Estimates by Components and Total Score

	# of Indicators	# of Estimates	Range	Median
<u>Bridges Components</u>				
Bridges Overview	3	2	33%–67%	50%
Bridges Day One	7	4	43%–100%	86%
Applying the Concepts	11	3	45%–100%	82%
<u>Design/Redesign</u>	8	3	0%–63%	38%
Total	29	3	29%–83%	66%
<u>Getting Ahead:</u>				
Getting Ahead				
Facilitator Training	7	4	40%–83%	60%
Getting Ahead				
<u>Workgroups</u>	4	3	25%–100%	50%
Total	11	2	44%–81%	63%

Bridges/Getting Ahead Model Outcome Indicators Scale

The development of outcome indicators for the *Bridges/Getting Ahead Model* was initiated simultaneously with the development of the *Bridges/Getting Ahead Model*

Fidelity Scale. This section consists of a rationale statement, information concerning the development and content validity, and suggested application.

Rationale

The implementation of the *Bridges/Getting Ahead Model* is designed to improve the lives of people in poverty by assisting them to improve their resources in 11 areas—Financial, Emotional, Mental, Language, Support, Physical, Spiritual, Integrity, Motivation, Role Models, and Hidden Rules. An overall outcome focuses on an individual increasing her/his stability of life.

Development

Validity. The *Bridges/Getting Ahead Outcome Indicators Scale* was initiated with the specification of the content validity for each of the indicators, with one or more references to the professional and research literature. The initial statements were reviewed by an expert panel—DeVol, Pfarr, and Dreussi Smith, with assistance from an external consultant in completing the process. This panel examined content validity and suggested refinements—additional concrete indicators. This panel confirmed the content validity of the array of indicators by resource, indicating that the array was both comprehensive and meaningful and supported the division of the indicators into two components—quantitative and qualitative. While the level of concreteness was higher for the Stability of Life Indicators and the indicators for the first six resources, the use of qualitative indicators for the last five resources (Spiritual, Integrity, Motivation, Role Models, and Hidden Rules) was meaningful for these areas. The content validity for this scale is contained in Appendix III-A.

Scale. The *Bridges/Getting Ahead Outcome Indicators Scale* (see Appendix III-B) is composed of multiple concrete indicators in seven areas—Stability of Life, Financial Resources, Emotional Resources, Mental Resources, Language Resources, Social Support Resources, Physical Resources—and qualitative indicators in five areas—Spiritual, Integrity, Motivation, Role Models, and Knowledge of the Hidden Rules. This scale is designed to provide an array of indicators in each area that can be tailored to reflect the needs and desired outcomes of individual clients. Clients with their facilitators can identify the area(s) and the indicator(s) that are meaningful to them. The expectation is that each client will select one or more indicators in one or more areas. However, there is no expectation that any client would select one or more indicators for all 11 areas, including Stability of Life. It also is possible for clients with their facilitators to add other indicators based on culture or other factors/dimensions. The scale for Meeting Standards is composed of four options: (1) No Action, (2) Initiated but Not Achieved, (3) Achieved, and (4) Maintained over Time. The current version was the result of multiple reviews by an expert panel (DeVol, Pfarr, and Dreussi Smith) and pilot-testing in sites using the model.

Instructions. Instructions for the *Bridges/Getting Ahead Outcome Indicators Scale* are contained in Appendix III-C. This document provides specific procedures for using

the scale with clients including the following topics: Who is to be evaluated, Who is to conduct the Outcome Indicators Scale, Data collection, When/frequency, Reports, General use of the form, Instructions for header, Instructions for the section, Meeting the Standards, Instructions for Stability of Life Indicators; Instructions for the first six (quantitative) Resource Indicators, and Instructions for the last five (qualitative) resources.

ADDENDUM (2007)

This Addendum consists of two parts—*Bridges/Getting Ahead Model Fidelity Scale (updated)* and *Guidelines for Implementing the Bridges/Getting Ahead Model*. The first presents refinements of the instrument used in the reliability studies. The second is composed of procedures designed to increase the effectiveness of the implementation of the *Bridges/Getting Ahead Model*.

Bridges Getting Ahead Model Fidelity Scale (updated)

Based on DeVol's and Dreussi Smith's experiences in using the version for the reliability studies, the *Bridges/Getting Ahead Model Fidelity Scale* was improved as follows:

- The standard of “2=Initiated but Not Achieved” was changed to “2=Initiated and Mostly Achieved.”
- The criteria for the “2=Initiated and Mostly Achieved” column had “(51%+)” added, and the “3=Achieved” column had “(90%+)” added to emphasize the criteria that were being used to determine a “2” or “3” rating.
- No indicators were deleted.
- In the Getting Ahead Facilitator Training, three indicators were revised as follows:
 - The first indicator was revised to “Demonstrates *Bridges/Getting Ahead* Knowledge” to emphasize the “Getting Ahead” content.
 - The third indicator was revised to “Uses registers appropriately (including translation of abstract concepts using the casual register)” to emphasize this function of language registers for adult learning.
 - The sixth indicator was revised to “Empathetic, but not easily manipulated; challenges thinking” to emphasize the proactive effort to challenge thinking rather than being manipulated.
- In the Getting Ahead Workshops, one indicator was revised, and one was added as follows:
 - The first indicator was revised to “Participant created a plan for at least one resource” to emphasize the participant's responsibility in creating the plan.
 - A new indicator was added: “Staff provided bridging social capital” to emphasize the modeling of desired behavior expected of the facilitators.

This refined version is contained in Appendix IV-A.

Guidelines for Implementing the Bridges/Getting Ahead Model

Based on experiences in implementing the *Bridges/Getting Ahead Model* in multiple sites, DeVol developed specific guidelines for implementing the model to assist those in local agencies to maximize the effectiveness of their efforts. This document (see

Appendix IV-B) describes the roles, responsibilities, and skills of the facilitator in nine areas—Problem solvers, Investigators, Sequence and reinforcement, Motivation for change, Mental models, Self-assessment, Community assessment, Personal and community plans, and Facilitator characteristics. This document also specifies six sponsor responsibilities, including Attraction, not coercion; Stipends; Twenty sessions; Closed group; Long-term support; and Getting to the table. Initial response by current implementers has been positive and productive.

References

Deficit Reduction Act of 2005.

DeVol, Philip E. (2006, First Revised Edition). *Getting Ahead is a Just-Gettin'-By World: Building Your Resources for a Better Life*. Highlands, TX: aha! Process, Inc.

Payne, Ruby K. (2005, Fourth Revised Edition). *A Framework for Understanding Poverty*. Highlands, TX: aha! Process, Inc.

Payne, Ruby K., DeVol, Philip E., & Dreussi Smith, Terie. (2006, Second Revised Edition). *Bridges Out of Poverty: Strategies for Professionals and Communities*. Highlands, TX: aha! Process, Inc.

Welfare Reform Act of 1996.

Appendix I

Bridges/Getting Ahead Model Fidelity Scale

Name of reviewer _____ Start date _____ Review date _____

Name of source _____ Job title of source _____

Critical indicators section under review _____

Contact number _____ Organization/project _____

Critical Indicators	Provided		Meeting Standard			
	Yes	No	1 No Action	2 Initiated but Not Achieved	3 Achieved	4 Maintained over Time
<u>Bridges Overview</u>						
Applies Bridges concepts to agency mission						
Recognizes policy implications						
Recognizes community implications						
<u>Bridges Day One</u>						
Analyzes mental models of economic class						
Analyzes causes of poverty						
Uses hidden rules skillfully						
Evaluates resources						
Uses language registers appropriately						
Uses discourse patterns appropriately						
Identifies family structures						
<u>Applying the Concepts</u>						
Creates positive relationships with clients						
Makes deposits						
Uses mediation						
Uses mental models						
Uses adult voice						
Builds future story						
Encourages practice of choice making						
Teaches planning strategies						
Teaches procedural self talk						
Assists clients to negotiate change						
Provides follow-up and support for change						

Critical Indicators	Provided		Meeting Standard			
	Yes	No	1 No Action	2 Initiated but Not Achieved	3 Achieved	4 Maintained over Time
<u>Design/Redesign</u>						
Staff training change to include Bridges						
Client orientation change						
Increase time for staff/client relationships						
Discipline system focus on learning						
Use of mental models						
Long-term support for people in transition						
Provide mentoring						
Build social capital						
Getting Ahead Facilitator (Training)						
Demonstrates Bridges knowledge						
Adheres to model						
Uses registers appropriately						
Facilitates another person's self-discovery						
Works well with co-facilitator who was a former group participant						
Empathetic, but not easily "played"						
Willing to be part of another person's bridging social capital						
<u>Getting Ahead Workgroups</u>						
Created plan for at least one resource						
Attended 90% of group sessions						
Long-term support provided by agency						
Long-term support provided by community						

Appendix II

Bridges/Getting Ahead Model Fidelity Scale Instructions

Who Is to Conduct Fidelity Scale

- aha! Process consultant
- Information to be provided by implementing organization

Data Collection

- Implementing organization responsible for data on who is trained

When/Frequency

- Semi-annually

Reports

- Formative: at six months
- Summative: at 12 months

Who Is to Be Assessed

- Bridges Overview: board and managers
- Bridges Day One: front-line staff
- Applying the Concepts: front-line staff
- Design/Redesign: administration and managers
- Getting Ahead Facilitator Training: Getting Ahead facilitators
- Getting Ahead Workgroups: Getting Ahead investigators/participants

Different parts of the form apply to different departments and individuals, so some parts of the form will be filled out, while others will be blank. The “Critical Indicators Section Under Review” line will identify which section(s) of the form will be filled out.

Instructions for Header

- Filled out by aha! Process consultant
- Used for gathering information from various sources

Instructions for “Provided: Yes/No” Section

These columns are to identify whether or not (yes/no) the training was provided to the individual [source: attendance rosters].

Instructions for “Meeting Standards” Section

Reviewer must observe or see documentation of the critical indicators and note the degree to which the standard is being met: minimal action, initiated and mostly achieved

(51%+), achieved (90%+), maintained over time. The first column (minimal action) indicates that the standard has not been met.

Instructions for Bridges Overview

Critical Indicators Descriptions

Applies Bridges concepts to agency mission: Does the board or manager use Bridges constructs or language when discussing the agency mission and in producing promotional materials, press releases, or reports? [sources: observations by reviewer, evidence in written documents].

Recognizes policy implications: Has the board or manager used Bridges constructs or language to change policies and/or procedures? [source: evidence in written documents].

Recognizes community implications: Has the board or manager used Bridges constructs or language to change relationships and structures within the community? Has the board worked in the community to develop strategies across all four areas of research on the causes of poverty? [sources: evidence in minutes, memoranda of agreements, contracts, program development, press releases, reports].

Instructions for Bridges Day One

Critical Indicators Descriptions

Analyzes mental models of economic class: Does the staff member identify, document, and apply information about the environment of participants in terms of stability, vulnerability, driving forces, strengths and weaknesses, and interlocking elements? [sources: observations by reviewer, evidence in case notes, illustrations/examples provided by person(s) being observed].

Analyzes causes of poverty: Does the staff member identify, document, and apply the client situation regarding the causes of poverty that apply to individuals in terms of individual behaviors, equity of access in the community, exploitation, and political/economic policy? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Uses hidden rules skillfully: Does the staff member demonstrate knowledge of hidden rules in interactions with individuals in poverty, co-workers, and community partners? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Evaluates resources: Does the staff member assess the resources of participants? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Uses language registers appropriately: Does the staff member use language registers to build relationships, collect data, plan, teach, and support program participants? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Uses discourse patterns appropriately: Does the staff member use discourse patterns to build relationships, collect data, plan, teach, and support program participants? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Identifies family structures: Does the staff member document the family structures of program participants? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Instructions for Applying the Concepts

Critical Indicators Descriptions

Creates positive relationships with clients: Are there relationships of mutual respect between the staff member and clients as evidenced by body language, expressions of affection and concern, and humor? [source: observations by reviewer].

Makes “deposits” (vs. “withdrawals”; see Covey): Does the staff member seek first to understand, keep promises, express kindnesses/courtesies, clarify expectations, show loyalty to the absent, apologize, and accept feedback? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Uses mediation: Does the staff member use the “what/why/how” teaching/learning strategies in informal and formal settings? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Uses mental models: Does the staff member use stories, analogies, metaphors, graphs, charts, and two-dimensional drawings with clients? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Uses adult voice: Does the staff member speak with clients as equals, ask questions, use reflective-listening skills, and have a win/win approach? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Builds future story: Does the staff member assist clients to visualize, articulate, and plan for the future, both informally and formally? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Encourages the practice of choice making: Does the staff member assist clients to develop and practice choice-making skills, both informally and formally? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Teaches planning strategies: Does the staff member embed planning strategies in most interactions with clients—both one to one and in classroom settings? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Teaches procedural self-talk: Does the staff member encourage clients to develop their own internal voice for supporting positive attitudes, choices, future orientation, and celebration? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Assists clients in negotiating change: Does the staff member create a problem-solving partnership, assess resistance and motivation, and assist the individual through the stages of change? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Provides follow-up and support for change: Does the staff member create a long-term plan for support with clients and assist them in developing support systems during their transition? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Instructions for Design/Redesign

Critical Indicators Descriptions

Staff training changed to include Bridges: Are all staff members trained in Bridges constructs and are follow-up reviews, case studies, and client applications part of staff meetings and supervision? [sources: rosters, minutes from staff meetings, illustrations/examples].

Client orientation changed: Are clients informed of new theories of change and changes in process and programming? [sources: written policies and procedures, orientation materials].

Increased time for staff/client relationships: Have policies and procedures been implemented that give staff and clients more time for relationship building, both in daily contacts and in the length of time for ongoing support during transition? [sources: written policies and procedures, program design documents].

Discipline system focused on learning: Do accountability systems explain expectations clearly? Are choices and future ramifications described in meaningful ways? Is choice making and accountability designed to give people practice? Is assistance given in planning? [sources: written policies and procedures, program-design documents].

Mental models used: Has the organization adopted mental models for orientation, education, data gathering, and planning? [source: mental models].

Long-term support provided for people in transition: Have the organization and community created equity in access to opportunities to transportation, childcare, healthcare, credit, education, and wages? [sources: planning documents, minutes from meetings, reports].

Mentoring provided: Has the organization developed informal or formal mentoring programs for people in transition? [sources: planning documents, minutes from meetings, reports].

Social capital built: Have people in poverty been brought into decision-making and problem-solving roles in the organization and community? Have people from different economic backgrounds been brought together in settings of mutual respect? [sources: planning documents, minutes of meetings, reports].

Instructions for Getting Ahead Facilitator Training

Critical Indicators Descriptions

Demonstrates Bridges knowledge: Does the facilitator have command of core concepts, such as mental models of poverty, research continuum, key points, hidden rules, resources, family issues, and language issues? [sources: observations by reviewer, evidence in case notes, illustrations/examples].

Adheres to model: Does the facilitator use the workbook in sequence and cover the content of each module—and do so in at least 15 sessions? [sources: observations by reviewer, schedules, attendance records, documents from Getting Ahead class].

Uses registers appropriately (including translation of abstract concepts using casual register): Does the facilitator translate from the formal to the casual effectively—and use casual register to make and maintain relationships? [source: observations by reviewer].

Facilitates another person's self-discovery: Does the facilitator encourage an individual's exploration of issues and analysis rather than "give the answers"? Does the facilitator "allow" the participants to do and decide what they can do and decide, not stepping in? Is the facilitator non-judgmental? [source: observations by reviewer].

Works well with a co-facilitator who was a former group participant: Does the facilitator include and value the input of the co-facilitator? [source: observations by reviewer].

Empathetic but not easily manipulated, challenges thinking: Does the facilitator demonstrate empathy with a healthy degree of detachment? Does the facilitator avoid "enabling" behavior and help participants be accountable for their own behavior? [source: observations by reviewer].

Uses mental models to illustrate abstract concepts: [source: review of representative mental models].

Instructions for Getting Ahead Workgroups
Critical Indicators Descriptions

The participant created a plan for at least one resource: Did the participant create a plan to raise resources? [source: notes by facilitator].

Staff provided bridging social capital: examples of interactions between staff and participant [source: concrete, observable examples].

Attended at least 90% of group sessions: Did the participant attend at least 90% of the sessions? [source: attendance roster].

Long-term support provided by agency: Did the agency develop a plan to provide long-term support for participants? Did the participants receive long-term support? [sources: planning documents, minutes of meetings, reports].

Long-term support provided by community: Did the agency develop a plan with the community to provide long-term support? Did the participants receive long-term support? [sources: planning documents, minutes of meetings, reports].

Appendix III: *Bridges/Getting Ahead Outcomes Indicators Scale*

Appendix III-A

Bridges/Getting Ahead Outcome Indicators Content Validity

STABILITY OF LIFE	
OUTCOME INDICATORS	CONTENT VALIDITY REFERENCES
Have achieved safe, stable housing at 35% of income	Henderson, Nan, Benard, Bonnie, & Sharp-Light, Nancy. (Eds.). (1999). <i>Resiliency In Action: Practical Ideas for Overcoming Risks and Building Strengths in Youth, Families, & Communities</i> . Groham, ME: Resiliency In Action
Have achieved safe, stable housing at 30% of income	HUD Section 8 Housing uses 30% benchmark
Pay bills without hustling	Getting Ahead participants
Have income where more than 50% of income comes from earnings and/or child support	State of Minnesota, Employability Measure, August 25, 2004
Have income where 100% of income comes from earnings and/or child support	Ibid.
Maintain employment; keep job	Opportunities Industrialization Corporation (OIC), Springfield, OH
Meet family self-sufficiency standard for state (if available)	Six Strategies for Family Economic Self-Sufficiency: A Project of Wider Opportunities for Women. www.sixstrategies.org/state/states.cfm
Experience less stress, feeling more relaxed	Getting Ahead participants State of Minnesota, Employability Measure, August 25, 2004
Have stabilized serious physical or mental health conditions; they only occasionally interfere with attendance at work or school	Sapolsky, Robert M. (1998). <i>Why Zebras Don't Get Ulcers: An Updated Guide to Stress, Stress-Related Diseases, and Coping</i> . New York, NY: W.H. Freeman & Co. State of Minnesota, Employability Measure, August 25, 2004
Have no significant legal issues, past or present	State of Minnesota, Employability Measure, August 25, 2004
Have resolved major legal issues	Ibid.
Work is possible because legal issues are managed	Ibid.
Achieved situation where family members are safe from violence some of the time	Putnam, Robert D. (2000). <i>Bowling Alone: the Collapse and Revival of American Community</i> . New York, NY: Simon & Schuster State of Minnesota, Employability Measure, August 25, 2004

STABILITY OF LIFE	
OUTCOME INDICATORS	CONTENT VALIDITY REFERENCES
Achieved situation where family members are safe from violence most of time	Ibid.
Achieved situation where family members are safe from violence	Ibid.
Achieved situation where destructive behaviors of others have less influence	Ibid.
Achieved situation where destructive behaviors of others have little influence	Ibid.
Achieved situation where there are fewer serious or frequent situations with children that interfere with work or parents' education, such as truancy, misbehavior requiring parent to visit school, other high-risk behaviors (sexual, alcohol, or other drug; anger, impulsiveness, destructiveness)	Ibid.
Achieved situation where all serious behaviors by children are under control	Ibid.
Achieved situation where care arrangements for children and/or adults in household are generally sufficient (subsidies, high-quality provider, sick leave available for care)	Ibid. Santelli, Josephine, J. (2004). <i>The Daycare Rating Book: How to Find, Select and Evaluate High Quality Childcare—and Keep It Once You've Found It</i> . South Burlington, VT: Up Spirit Press
Have dependable, reliable transportation that meets most needs	State of Minnesota, Employability Measure, August 25, 2004
Have dependable, reliable transportation of choice	Ibid.
Increased bridging social capital	Putnam, Robert D. (2000). <i>Bowling Alone: the Collapse and Revival of American Community</i> . New York, NY: Simon & Schuster

FINANCIAL RESOURCE OUTCOME INDICATORS	CONTENT VALIDITY REFERENCES
Have current résumé	Getting Ahead participants
Working with job developer	Ibid.
Applied for work	Ibid.
Got job	Ibid.
Got job that paid more than last job	Shipler, David K. (2004). <i>The Working Poor: Invisible in America</i> . New York, NY: Alfred A. Knopf State of Minnesota, Employability Measure, August 25, 2004
Work 40 hours a week	Opportunities Industrialization Corporation (OIC), Springfield, OH
Got a 40-hour-a-week job at a living wage	Ibid.
Have income where more than 50% of income is from earnings and/or child support	State of Minnesota, Employability Measure, August 25, 2004
Have income where 100% of income is from earnings and/or child support	Ibid.
Got a job paying self-sufficiency wage (if Self-Sufficiency Standard is available)	Six Strategies for Family Economic Self-Sufficiency: A Project of Wider Opportunities for Women. www.sixstrategies.org/state/states.cfm
Have family income well above basis living expenses, with little consumer debt, financial cushion for emergencies—and invest money for retirement	State of Minnesota, Employability Measure, August 25, 2004
Completed fiscal literacy class	Goethel, Jan. (Ed.). (2003). <i>Financial Literacy Instructional Guide</i> . Madison, WI: Wisconsin Technical College System
Reduced use of predatory lending (payday lenders, check cashing, lease/purchase)	Getting Ahead participants
Reduced debt	Goethel, Jan. (Ed.). (2003). <i>Financial Literacy Instructional Guide</i> . Madison, WI: Wisconsin Technical College System
Paying day-to-day expenses without hustling (selling plasma, drugs, etc.)	Getting Ahead participants
Use regular banking services, with checking and savings accounts	Goethel, Jan. (Ed.). (2003). <i>Financial Literacy Instructional Guide</i> . Madison, WI: Wisconsin Technical College System
Pay off credit-card debt every month; keep zero balance	Opportunities Industrialization Corporation (OIC), Springfield, OH
Saving money	Goethel, Jan. (Ed.). (2003). <i>Financial Literacy Instructional Guide</i> . Madison, WI: Wisconsin Technical College System
Bought house or business	Soto, Hernando de. (2000). <i>The Mystery of Capital: Why Capitalism Triumphs in the West and Fails Everywhere Else</i> . New York, NY: Basic Books
Achieved housing at 30% of income	HUD Section 8 Housing uses 30% benchmark

FINANCIAL RESOURCE OUTCOME INDICATORS	CONTENT VALIDITY REFERENCES
Have more than liability insurance on car	State of Minnesota, Employability Measure, August 25, 2004
Have private health insurance for children	Ibid.
Have private health insurance for family	Ibid.
Have dependable, reliable transportation of choice to meet most needs	Shipler, David K. (2004). <i>The Working Poor: Invisible in America</i> . New York, NY: Alfred A. Knopf

EMOTIONAL RESOURCE OUTCOME INDICATORS	CONTENT VALIDITY REFERENCES
Don't lose temper and yell at others	Twin Cities RISE! (2001). <i>Empowerment: A Course in Personal Empowerment</i> . Minneapolis, MN
Don't hit others	Getting Ahead participants
Think before talking	Pransky, Jack. (2003). <i>Prevention From the Inside-Out</i> . Cabot, VT: NorthEast Health Realization Institute
Have more positive attitude	Ibid.
Present self in positive way to others	Getting Ahead participants
Completed a class on how to handle feelings	Weisinger, Hendrie. (1998). <i>Emotional Intelligence at Work</i> . San Francisco, CA: Jossey-Bass
Manage conflicts without violence or threats of violence	State of Minnesota, Employability Measure, August 25, 2004
Identify, own, and take responsibility for feelings	Pransky, Jack. (2003). <i>Prevention From the Inside-Out</i> . Cabot, VT: NorthEast Health Realization Institute
Use positive self-talk	Twin Cities RISE! (2001). <i>Empowerment: A Course in Personal Empowerment</i> . Minneapolis, MN
Use positive communication skills	Ibid.
Negotiate in positive ways	Fisher, Roger, & Ury, William. (1983). <i>Getting to Yes: Negotiating Agreement Without Giving In</i> . New York, NY: Penguin Books
Make decisions based on future outcomes rather than immediate feelings	Goleman, Daniel. (1995). <i>Emotional Intelligence</i> . New York, NY: Bantam Books
Assess past emotional outbursts and admit responsibility for actions	Twin Cities RISE! (2001). <i>Empowerment: A Course in Personal Empowerment</i> . Minneapolis, MN

MENTAL RESOURCE OUTCOME INDICATORS	CONTENT VALIDITY REFERENCES
Look to the future; make decisions based on future impact	Getting Ahead participants
Addressing learning disability	State of Minnesota, Employability Measure, August 25, 2004
Taking classes	Getting Ahead participants
Earned GED (general educational development) certificate	<p>U.S. Bureau of the Census. (2001). U.S. Median Income for Persons Age 25 & Older, by Sex & Educational Attainment</p> <p>Stewart, Thomas A. (1997). <i>Intellectual Capital: The New Wealth of Organizations</i>. New York, NY: Currency Doubleday</p>
Read and write well enough to work in service sector	Opportunities Industrialization Corporation (OIC), Springfield, OH
Manage time demands: on time, meet deadlines	State of Minnesota, Employability Measure, August 25, 2004
Use planning strategies	<p>DeVol, Philip E., Payne, Ruby K., & Dreussi Smith, Terie. (2001). <i>Bridges Out of Poverty: Strategies for Professionals and Communities</i>. Highlands, TX: aha! Process</p> <p>Sharron, Howard, & Coulter, Martha. (1996). <i>Changing Children's Minds: Feuerstein's Revolution in the Teaching of Intelligence</i>. Birmingham, England: Imaginative Minds</p>
Completed class or course on any topic	<p>U.S. Bureau of the Census. (2001). U.S. Median Income for Persons Age 25 & Older, by Sex & Educational Attainment</p> <p>Stewart, Thomas A. (1997). <i>Intellectual Capital: The New Wealth of Organizations</i>. New York, NY: Currency Doubleday</p>
Learned new skill or trade	Ibid.
Earned credential and/or license	Ibid.
Earned two-year degree	Ibid.
Earned four-year degree	Ibid.
Encourage and support children and others to achieve educational goals	<p>Lareau, Annette. (2003). <i>Unequal Childhoods: Class, Race, and Family Life</i>. Berkeley, CA: University of California Press</p> <p>Hart, Betty, & Risley, Todd R. (1995). <i>Meaningful Differences in the Everyday Experience of Young American Children</i>. Baltimore, MD: Paul H. Brookes Publishing Co.</p> <p>Levine, Mel. (2002). <i>A Mind at a Time</i>. New York, NY: Simon & Schuster</p>

LANGUAGE RESOURCE OUTCOME INDICATORS	CONTENT VALIDITY REFERENCES
Use appropriate language in variety of settings	Getting Ahead participants
Completed class in literacy, communication, language	Sanders, Barry. (1994). <i>A Is for Ox: The Collapse of Literacy and the Rise of Violence in an Electronic Age</i> . New York, NY: Vintage Books
Use casual and formal registers skillfully; bilingual in registers	Payne, Ruby K. (2005). <i>A Framework for Understanding Poverty</i> . Fourth revised edition. Highlands, TX: aha! Process
Use formal/consultative register with proper syntax and grammar	Sanders, Barry. (1994). <i>A Is for Ox: The Collapse of Literacy and the Rise of Violence in an Electronic Age</i> . New York, NY: Vintage Books
Use language to negotiate and solve problems	Ibid. Fisher, Roger, & Ury, William. (1983). <i>Getting to Yes: Negotiating Agreement Without Giving In</i> . New York, NY: Penguin Books.
Use abstract terms to express complex ideas	Payne, Ruby K. (2005). <i>A Framework for Understanding Poverty</i> . Fourth revised edition. Highlands, TX: aha! Process
Use “voices” appropriately	Ibid.
Provide children with a varied and rich language experience to prepare them for school	Hart, Betty, & Risley, Todd R. (1995). <i>Meaningful Differences in the Everyday Experience of Young American Children</i> . Baltimore, MD: Paul H. Brookes Publishing Co. Lareau, Annette. (2003). <i>Unequal Childhoods: Class, Race, and Family Life</i> . Berkeley, CA: University of California Press

SOCIAL SUPPORT RESOURCE OUTCOME INDICATORS	CONTENT VALIDITY REFERENCES
Have bridging support of more people outside of family	Putnam, Robert D. (2000). <i>Bowling Alone: the Collapse and Revival of American Community</i> . New York, NY: Simon & Schuster
Have more positive bonding support from people in family	Ibid.
Achieved situation where destructive behaviors of others have little influence	State of Minnesota, Employability Measure, August 25, 2004
Achieved situation where there are fewer serious or frequent situations with children that interfere with work or parents' education, such as truancy, misbehavior requiring parent to visit school, other high-risk behaviors (sexual, alcohol, or other drug; anger, impulsiveness, destructiveness)	Ibid.
Achieved situation where all serious behaviors by children are under control	Ibid.
Joined new group or organization	Putnam, Robert D. (2000). <i>Bowling Alone: the Collapse and Revival of American Community</i> . New York, NY: Simon & Schuster
Work as volunteer or advocate in community	Ibid.
Play positive role in neighborhood or community	Wickman, Floyd, & Sjodin, Terri. (1997). <i>Mentoring: The Most Obvious Yet Overlooked Key to Achieving More in Life Than You Dreamed Possible: A Success Guide for Mentors and Proteges</i> . Chicago, IL: Irwin Professional Publishing
Use mentor or sponsor	Ibid.
Serve as mentor or sponsor for others	Ibid.

PHYSICAL RESOURCE OUTCOME INDICATORS	CONTENT VALIDITY REFERENCES
Have improved care of body: weight, teeth, hygiene	Sapolsky, Robert M. (1998). <i>Why Zebras Don't Get Ulcers: An Updated Guide to Stress, Stress-Related Diseases, and Coping</i> . New York, NY: W.H. Freeman & Co. Gladwell, Malcolm. (August 29, 2005). The moral-hazard myth: the bad idea behind our failed health-care system. <i>The New Yorker</i>
Have met short-term treatment/health goals	Miller, William R., & Rollnick, Stephen. (2002). <i>Motivational Interviewing: Preparing People for Change</i> . Second edition. New York, NY: Guilford Press State of Minnesota, Employability Measure, August 25, 2004
Have met long-term treatment/health goals	Ibid.
Can now do physical things that could not be done before	Getting Ahead participants
Have stabilized serious physical or mental health conditions; they only occasionally interfere with attendance at work or school	State of Minnesota, Employability Measure, August 25, 2004
Achieved situation where all serious and mental health concerns are under control	Ibid.
Achieved situation where there are no serious physical or mental health concerns	Ibid.
Achieved sufficient care arrangements for children and/or adults in household; subsidies, high-quality provider, sick leave available for care	Ibid.
Achieved good care arrangements for children and/or adults in household (able to select care without subsidy, high-quality provider, backup arrangement available)	Ibid.
Completed prevention and/or wellness classes	Sapolsky, Robert M. (1998). <i>Why Zebras Don't Get Ulcers: An Updated Guide to Stress, Stress-Related Diseases, and Coping</i> . New York, NY: W.H. Freeman & Co.

QUALITATIVE	
Examples and Notes	
SPIRITUAL	
INTEGRITY	
MOTIVATION	
ROLE MODELS	
HIDDEN RULES	

Appendix III-B

Bridges Outcome Indicators Scale

Participant name _____ Getting Ahead start date _____ Getting Ahead completion date _____
 Address _____ Phone contact _____
 Getting Ahead facilitator _____ Reviewer _____ Review date _____
 Resource(s) selected to develop _____ Participant code _____

STABILITY OF LIFE INDICATORS	Meeting Standards			
	1 No Action	2 Initiated but Not Achieved	3 Achieved	4 Maintained over Time
<i>If item 2 applies, do not respond to item 1.</i>				
1. Achieved safe, stable housing at 35% of income				
2. Achieved safe, stable housing at 30% of income				
3. Pay bills without hustling				
<i>If item 5 applies, do not respond to item 4.</i>				
4. Have income where more than 50% of income comes from earnings and/or child support				
5. Have income where 100% of income comes from earnings and/or child support				
6. Maintaining employment, keeping a job				
7. Meeting family self-sufficiency standard for state (if available)				
* 8. Experiencing less stress, feeling more relaxed				
9. Have stabilized serious physical or mental health conditions; they only occasionally interfere with attendance at work or school				
<i>If item 10 applies, do not respond to items 11 and 12.</i>				
10. Have no significant legal issues, past or present				
11. Resolved major legal issues				
12. Work is possible because legal issues are managed				
<i>Select the most appropriate response from items 13, 14, and 15. One item only.</i>				
13. Achieved situation where family members are safe from violence <i>some</i> of time				
14. ... <i>most</i> of time				
15. ... <i>all</i> of the time.				
*16. Achieved situation where destructive behaviors of others have less influence				
17. Achieved situation where destructive behaviors of others have little influence				
<i>If item 19 applies, do not respond to item 18.</i>				

43. Achieved housing at 30% of income				
44. Have more than liability insurance on car				
45. Have private health insurance for children				
46. Have private health insurance for family				
47. Have dependable, reliable transportation of choice to meet any needs				
EMOTIONAL RESOURCE INDICATORS <u>Part of Plan</u>	Meeting Standards			
	1 No Action	2 Initiated but Not Achieved	3 Achieved	4 Maintained over Time
48. Don't lose temper and yell at others				
49. Don't hit others				
50. Think before talking				
* 51. Have more positive attitude				
52. Present self in positive way to others				
53. Completed class on how to handle feelings				
54. Manage conflicts without violence or threats of violence				
55. Identify, own, and take responsibility for feelings				
56. Use positive self-talk				
57. Use positive communication skills				
58. Negotiate in positive ways				
59. Make decisions based on future outcomes rather than immediate feelings				
60. Assess past emotional outbursts and take responsibility for actions				
MENTAL RESOURCE INDICATORS <u>Part of Plan</u>	Meeting Standards			
	1 No Action	2 Initiated but Not Achieved	3 Achieved	4 Maintained over Time
61. Looking to future; making decisions based on future impact				
62. Addressing learning disability				
63. Taking classes				
64. Earned GED				
65. Read and write well enough to work in service sector				
66. Manage time demands: on time, meet deadlines				

67. Use planning strategies				
68. Completed class or course on any topic.				
69. Learned new skill or trade				
70. Earned credential and/or license				
71. Earned two-year degree				
72. Earned four-year degree				
73. Encourage and support children and others to achieve educational goals				
LANGUAGE RESOURCE INDICATORS __ Part of Plan	Meeting Standards			
	1 No Action	2 Initiated but Not Achieved	3 Achieved	4 Maintained over Time
74. Use appropriate language in variety of settings				
75. Completed class in literacy, communication, language				
76. Use casual and formal registers skillfully; bilingual in registers				
77. Use formal/consultative register with proper syntax and grammar				
78. Use language to negotiate and solve problems				
79. Use abstract terms to express complex ideas				
80. Use “voices” appropriately				
81. Provide children with varied and rich language experience to prepare them for school				
SOCIAL SUPPORT RESOURCE INDICATORS __ Part of Plan	Meeting Standards			
	1 No Action	2 Initiated but Not Achieved	3 Achieved	4 Maintained over Time
82. Have bridging support of more people outside of family				
83. Have more positive bonding support from people in family				
84. Achieved situation where destructive behaviors of others have little influence				
<i>If item 86 applies, do not respond to item 85.</i>				
85. Achieved situation where there are fewer serious or frequent situations with children that interfere with work or parents’ education, such as truancy, misbehavior requiring parent to visit school, other high-risk behaviors (sexual, alcohol or other drug, anger, impulsiveness, destructiveness)				
86. Achieved situation where all serious behaviors by children are under control				
87. Joined new group or organization				

88. Work as volunteer or advocate in community				
89. Play positive role in neighborhood or community				
90. Use mentor or sponsor				
91. Serve as mentor or sponsor for others				
PHYSICAL RESOURCE INDICATORS ____ Part of Plan	Meeting Standards			
	1 No Action	2 Initiated but Not Achieved	3 Achieved	4 Maintained over Time
* 92. Have improved care of body: weight, teeth, hygiene				
* 93. Met short-term treatment/health goals				
* 94. Met long-term treatment/health goals				
* 95. Can now do physical things that could not be done before				
96. Have stabilized serious physical or mental health conditions; they only occasionally interfere with attendance at work or school				
97. Achieved situation where all serious and mental health concerns are under control				
98. Achieved situation where there are no serious physical or mental health concerns				
If item 100 is selected, do not respond to item 99.				
99. Achieved sufficient care arrangements for children and/or adults in household (subsidies, high-quality provider, sick leave available for care)				
100. Achieved good care arrangements for children and/or adults in household (able to select care without subsidy, high-quality provider, backup arrangement available)				
101. Completed prevention and/or wellness classes				

QUALITATIVE

Examples and Notes

SPIRITUAL ___ Part of Plan	
INTEGRITY ___ Part of Plan	
MOTIVATION ___ Part of Plan	
ROLE MODELS ___ Part of Plan	
KNOWLEDGE OF HIDDEN RULES ___ Part of Plan	

Appendix III-C

Bridges Outcome Indicator Scale

Instructions

Who Is to Be Evaluated

- Getting Ahead participants

Who Is to Conduct the Outcome Indicator Scale

- aha! Process consultant
- Individual from implementing organization, trained by aha! Process

Data Collection

- Data to come from two sources: participant records, participants
- Data to be collected by implementing organization
- Implementing organization to maintain contact with participants
- Participants paid for participating in study each time they provide data

This instrument is divided into the following sections:

- Stability of Life Indicators
- Quantitative Resource Indicators including six resources: financial, emotional, mental, language, social support, and physical.
- Qualitative Resource including five resources: spiritual, integrity, motivation, role models, and knowledge of hidden rules.

When/Frequency

- Baseline—conducted after completing Module 8.
- Semi-annually from date that Getting Ahead Workgroup ends.

Reports

- Formative: at six months
- Summative: at 12 months

General Use

This form is to be used at least three times, first when collecting baseline data and at six and twelve months following the completion of the Getting Ahead Workgroup.

- Stability of Life Indicators will be collected on all occasions.
- When collecting Baseline Data all six Quantitative Resources will be assessed, but no Qualitative data will be collected.
- At six and twelve months the Quantitative Resources that the Getting Ahead participant planned to develop will be assessed along with any other Quantitative

Resources and Qualitative Resources that the participant chooses to add to the study.

Instructions for Header

- Filled out by reviewer
- Assign a code for each participant so that data can be tracked over time
- Identify which resources the participant was planning to build

Instructions for Meeting Standards Section

Information is marked on the line under the headings: No Action, Initiated but Not Achieved, Achieved, and Maintained Over Time (at least one year). In each of these sections are subsections divided by blank lines. It's necessary to provide data in each subsection but not on every line within that subsection. The empty rows at the end of each resource are for other evidence of achievement and are to be filled in by the reviewer.

Instructions for Stability of Life Indicators

The indicators are arranged to capture incremental improvements in housing, income, employment, stress and health, legal issues, safety and violence, family stability, transportation, and social connections. This instrument, used over time, also will record movement toward greater stability.

It's necessary to fill in each section, but not every line in each section. In other words, if the individual has achieved safe, stable housing at 35% of his/her income, it isn't necessary to fill in the next line that records housing at 30% of income. Leaving a line blank in any given section means that the item did not apply—as in the example above [sources: agency records, interview with participant].

Instructions for (First Six) Quantitative Resource Indicators

Work through the form to note the resource(s) that were part of the individual's plan. (These are labeled in the header.) For example, the participant may have made plans to build his/her financial and motivational resources. That should be noted on the "Part of Plan" line. The other resources, while not part of the line, also may be assessed. The resources are interlocking, so it's likely that these resources have been enhanced as well.

It's necessary to respond to each section within each resource, but it isn't necessary to enter data on every line, just those that apply. The items are in a progression that credits incremental change. Prior to conducting the review it will be necessary to ascertain a living wage and Self-Sufficiency Standard for the state [sources: case files, participant interview, staff interview].

Instructions for (Last Five) Qualitative Resources

These resources are harder to quantify and yet play an important role in the transition to stability. Document evidence of improved resources in as much detail as possible.

Stories, illustrations, and examples help round out the data on the individual's process of transition [sources: case files, participant interview, staff interview].

Instructions for collecting baseline data

- Collect data following the completion of the self-assessment in Module 8.
- The Getting Ahead participant can look at her/his responses to the self-assessment to better respond to the statements in the Outcome Indicator Scale.
- The interviewer will read the Outcome Indicator Scale items and seek to identify observable, tangible evidence for the answers given. Again, the self-assessment in Module 8 will be of assistance in this process.
- Do not address items marked with an asterisk.
- Cover only the first two sections of the Scale including the first six resources. Do not collect qualitative data. Note, when collecting data later in the study (at six and twelve months) the resources that will be covered will be those included in the investigator's plan and any others that the investigator developed that were not included in the plan. In other words, the participant is not expected to build all resources.

Appendix IV: Updated Materials (Addendum 2007)

Appendix IV-A: Bridges/Getting Ahead Model Fidelity Scale (Updated)

Bridges/Getting Ahead Model Fidelity Scale

Name of reviewer _____ Start date _____ Review date _____

Name of source _____ Job title of source _____

Critical indicator section under review _____

Contact number _____ Organization/project _____

Critical Indicators	Provided		Meeting Standards			
	Yes	No	1 Minimal Action	2 Initiated and Mostly Achieved (51% +)	3 Achieved (90% +)	4 Maintained over Time
<u>Bridges Overview</u>						
Applies Bridges concepts to agency mission						
Recognizes policy implications						
Recognizes community implications						
<u>Bridges Day One</u>						
Analyzes mental models of economic class						
Analyzes causes of poverty						
Uses hidden rules skillfully						
Evaluates resources						
Uses language registers appropriately						
Uses discourse patterns appropriately						
Identifies family structures						
<u>Applying the Concepts</u>						
Creates positive relationships with clients						
Makes “deposits”						
Uses mediation						
Uses mental models						
Uses adult voice						
Builds future story						
Encourages practice of choice making						
Teaches planning strategies						
Teaches procedural self-talk						
Helps clients negotiate change						
Provides follow-up and support for change						

Critical Indicators	Provided		1 Minimal Action	2 Initiated and Mostly Achieved (51% +)	3 Achieved (90% +)	4 Maintained over Time
	Yes	No				
<u>Design/Redesign</u>						
Staff training change to include Bridges						
Client orientation change						
Increased time for staff/client relationships						
Discipline system focused on learning						
Mental models used						
Long-term support for people in transition						
Mentoring provided						
Social capital built						
<u>Getting Ahead Facilitator Training</u>						
Demonstrates Bridges/Getting Ahead knowledge						
Adheres to model						
Uses registers appropriately (including translation of abstract concepts using casual register)						
Facilitates another person's self-discovery						
Works well with co-facilitator who was former group participant						
Empathetic but not easily manipulated; challenges thinking						
Uses mental models to illustrate abstract concepts						
<u>Getting Ahead Workgroups</u>						
Participant created plan for at least one resource						
Staff provided bridging social capital						
Attended at least 90% of group sessions						
Long-term support provided by agency						
Long-term support provided by community						

Appendix IV-B

Guidelines for Implementing *Bridges/Getting Ahead Model*

Prepared by Philip E. DeVol

Thanks to feedback from facilitators and sponsors who use Getting Ahead, we have learned what elements of our model are essential. In other words, we can now define our model. In order to adhere to our model, sponsors and facilitators are asked to attend to the following:

Role, Responsibilities, and Skills of the Facilitator

1. *Problem solvers:* Our view (or mental model) of Getting Ahead participants must be based on the understanding that they are problem solvers in their daily lives and can be problem solvers at the community level. They are needed at the planning tables in our communities.
2. *Investigators:* Getting Ahead participants are most accurately described as “investigators.” They investigate community life, as well as their personal circumstances in light of the new learning they’re doing. Each module is another layer of that investigation. It isn’t the facilitator’s job to defend everything in the workbook; it’s the facilitator’s job to help the investigators dig into the material.
3. *Sequence and reinforcement:* The sequence has been worked out carefully so that investigators move from the safe to the challenging, the concrete to the abstract, and the small to the large. It allows for reinforcement of the difficult concepts and is not to be altered.
4. *Motivation for change:* Those who participate in the workgroup are not expected to be motivated for change at the outset. The process and the facilitator assist people in making their own arguments for change. It isn’t necessary for the facilitator to make the arguments; in fact, the facilitator should not make the arguments for change. Facilitators who adhere to this model and have the ability to assist in another person’s process of self-discovery are to be prized.
5. *Mental models:* The investigators are asked to end the workgroup with mental models of their own making that describe their process, hold the knowledge of their investigation, and guide their action.
6. *Self-assessment:* Developing a plan without doing an accurate self-assessment is meaningless. The quality of the plan stems from the quality of thinking that goes into the assessment; therefore, it’s necessary to practice analyzing resources using the case studies found in *Bridges Out of Poverty*.
7. *Community assessment:* This assessment is equally important and is to arise out of the work of the group. Community organizations should not be brought in for “dog and pony shows.”
8. *Personal and community plans:* The ultimate goal is to create plans for building resources on personal and community levels.
9. *Facilitator characteristics:* Select facilitators who have the knowledge, skills, and attitudes described in the “Getting Ahead Facilitator Qualities.”

Sponsor Responsibilities

10. *Attraction, not coercion:* Planners are often pushed for quick results and think that forcing people to attend a particular workshop will bring the desired outcome. We, on the other hand, think this learning experience will attract people through word of mouth. Sanctions for failing to attend are unnecessary, even counterproductive.
11. *Stipends:* Administrators are often driven to be cost-effective. This means doing more with less—in this case, less money. Choosing not to pay stipends appears on the surface to be an easy solution. But paying stipends makes the point that people in poverty have something to offer the decision-making process in our communities, that the results of the Getting Ahead investigation have value, and that the investigators are being paid for their work.
12. *Fifteen sessions:* Another way of doing more for less is to reduce the amount of time given to the work, i.e., to cut down on the number of sessions. Fifteen weeks is the minimum amount of time needed to cover the information.
13. *Closed group:* There are two reasons for running the workbook with the same set of investigators from beginning to end. Having new people join the group means that they will not experience the sequence of learning as it works best. Second, the Getting Ahead process is based on a growing sense of trust and shared experiences.
14. *Long-term support:* The responsibility for this element falls on the sponsors of the workgroup more than on the facilitator. They are to be champions for the Getting Ahead investigators, making a place for them to build resources according to their own plans—and engaging the community to assist them during their transition. The investigators themselves may have plans of their own regarding long-term support; the sponsors are to be prepared to assist them.
15. *Getting to the table:* If the investigators want to take part in community planning and decision making, i.e., if they want to “get to the table,” the sponsor and facilitator need to be prepared to assist and mentor them, as well as to prepare the community for their participation.