BIG BETTER BEST!

Big Brothers Big Sisters

National Conference

Big Brothers Big Sisters

BIG BETTER BEST!

Utilizing AIM to the Fullest

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Big Brothers Big Sisters of Puget Sound

Vice President of Quality Assurance & Strategic Impact

And Part Time Elf at the National Help Desk!

Today's Goals

Best utilization of AIM in it's current state.

Answer your questions!

Future of AIM...

Common AIM Questions

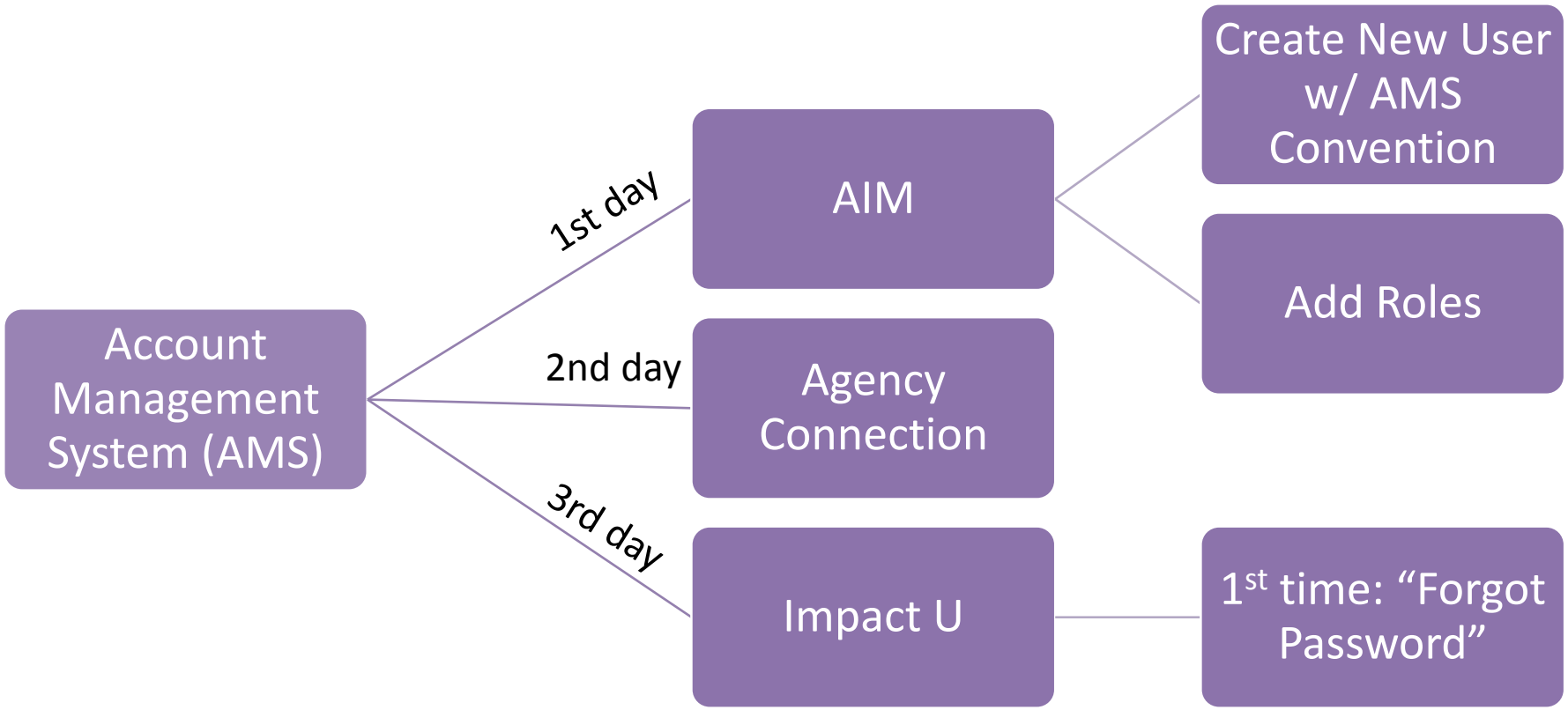
AIM built to ONLY be used with Internet Explorer

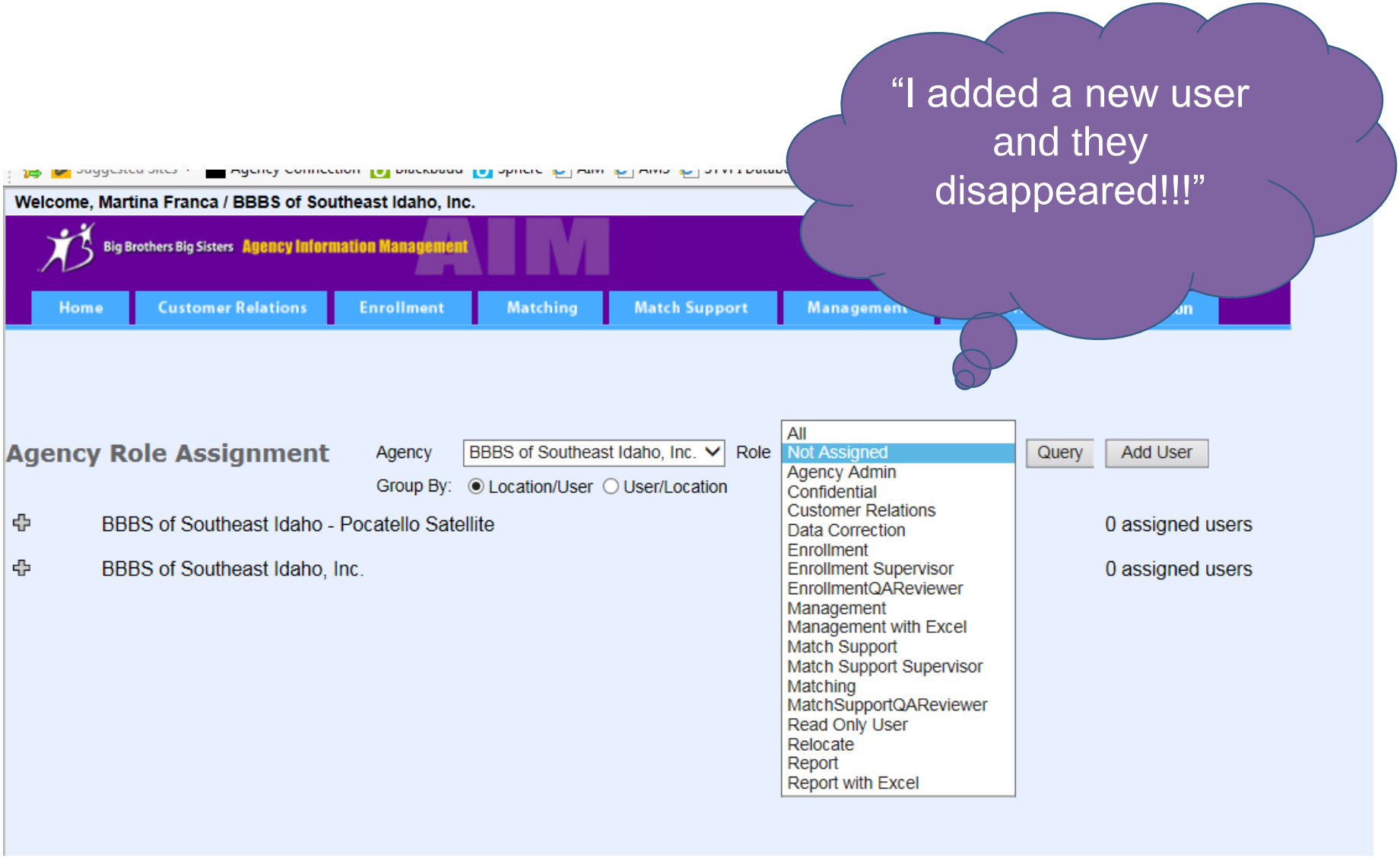
We’re not joking.

Releasing Volunteers

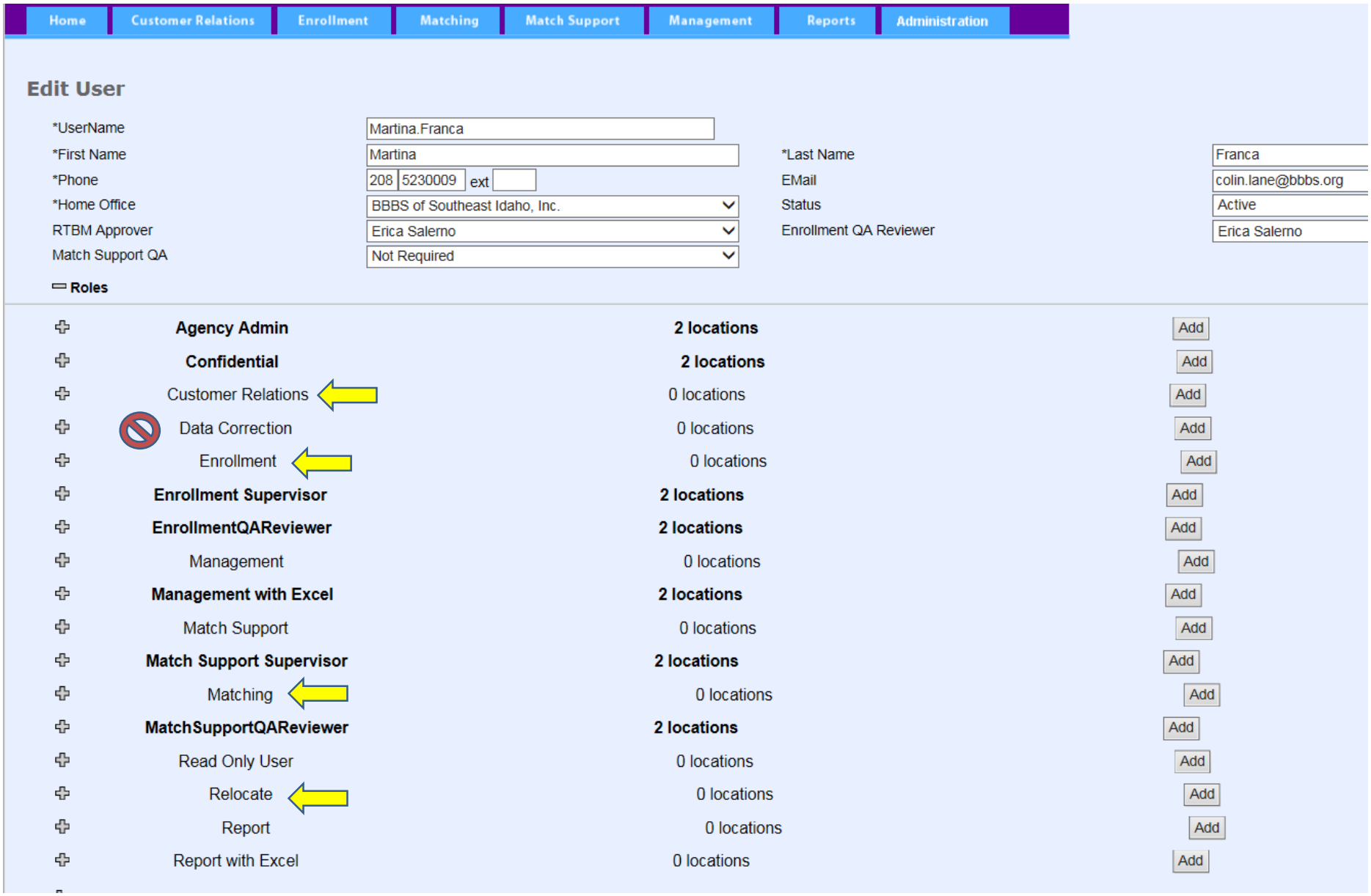
- When volunteers move to a different agency their SSN needs to be "released" on General tab.
- This does not make their record viewable to the other agency.
- Perfect time to complete Youth Serving Organization reference.

Adding New Users

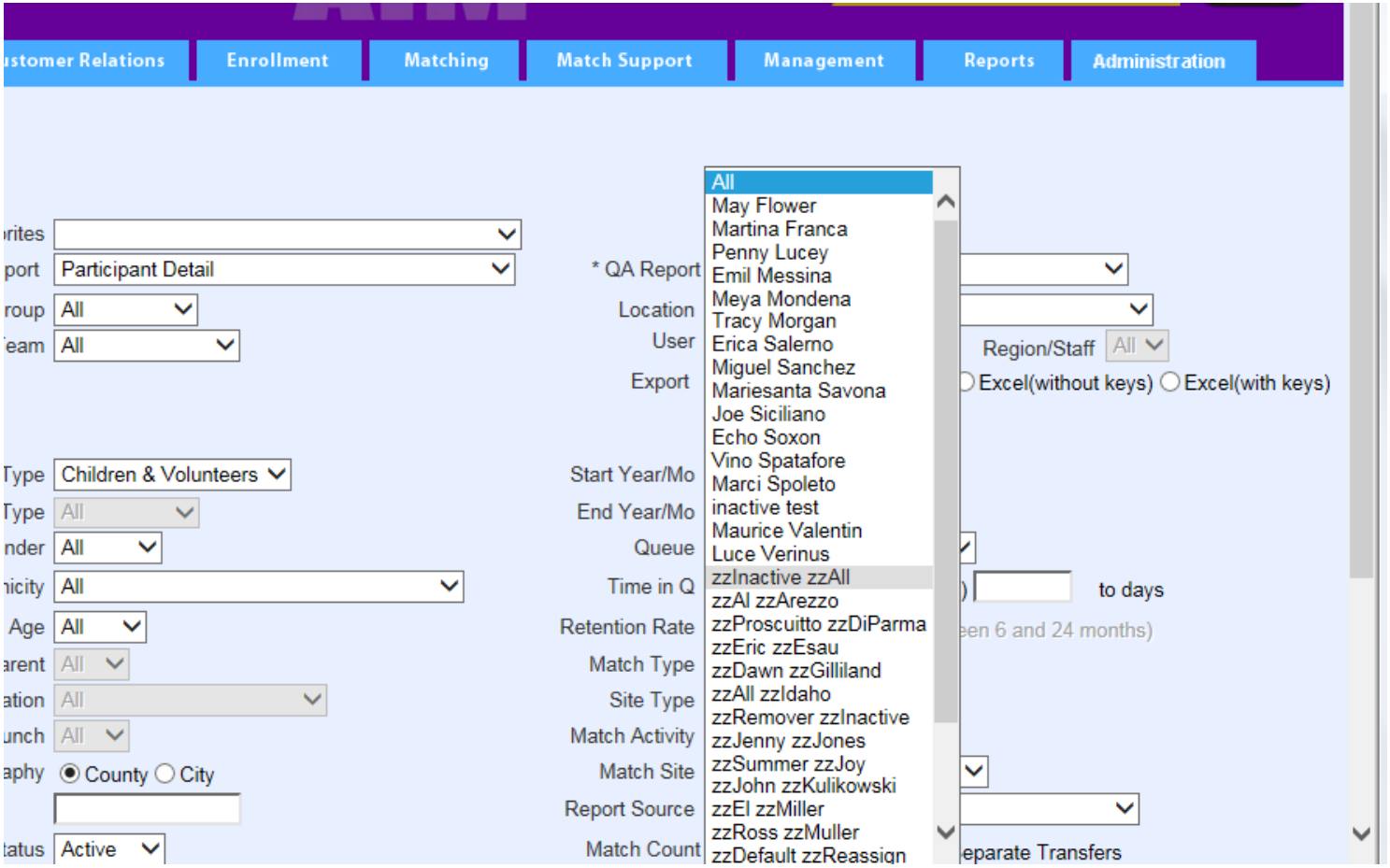



"I added a new user and they disappeared!!!"
Welcome, Martina Franca / BBBS of Southeast Idaho, Inc.
Big Brothers Big Sisters Agency Information Management
AIM
Home
Customer Relations
Enrollment
Matching
Match Support
Agency Role Assignment
Agency
BBBS of Southeast Idaho, Inc.
Role
Query
Add User
Group By: Location/User User/Location
BBBS of Southeast Idaho - Pocatello Satellite
0 assigned users
BBBS of Southeast Idaho, Inc.
0 assigned users
All
Not Assigned
Agency Admin
Confidential
Customer Relations
Data Correction
Enrollment
Enrollment Supervisor
EnrollmentQAReviewer
Management
Management with Excel
Match Support
Match Support Supervisor
Matching
MatchSupportQAReviewer
Read Only User
Relocate
Report
Report with Excel

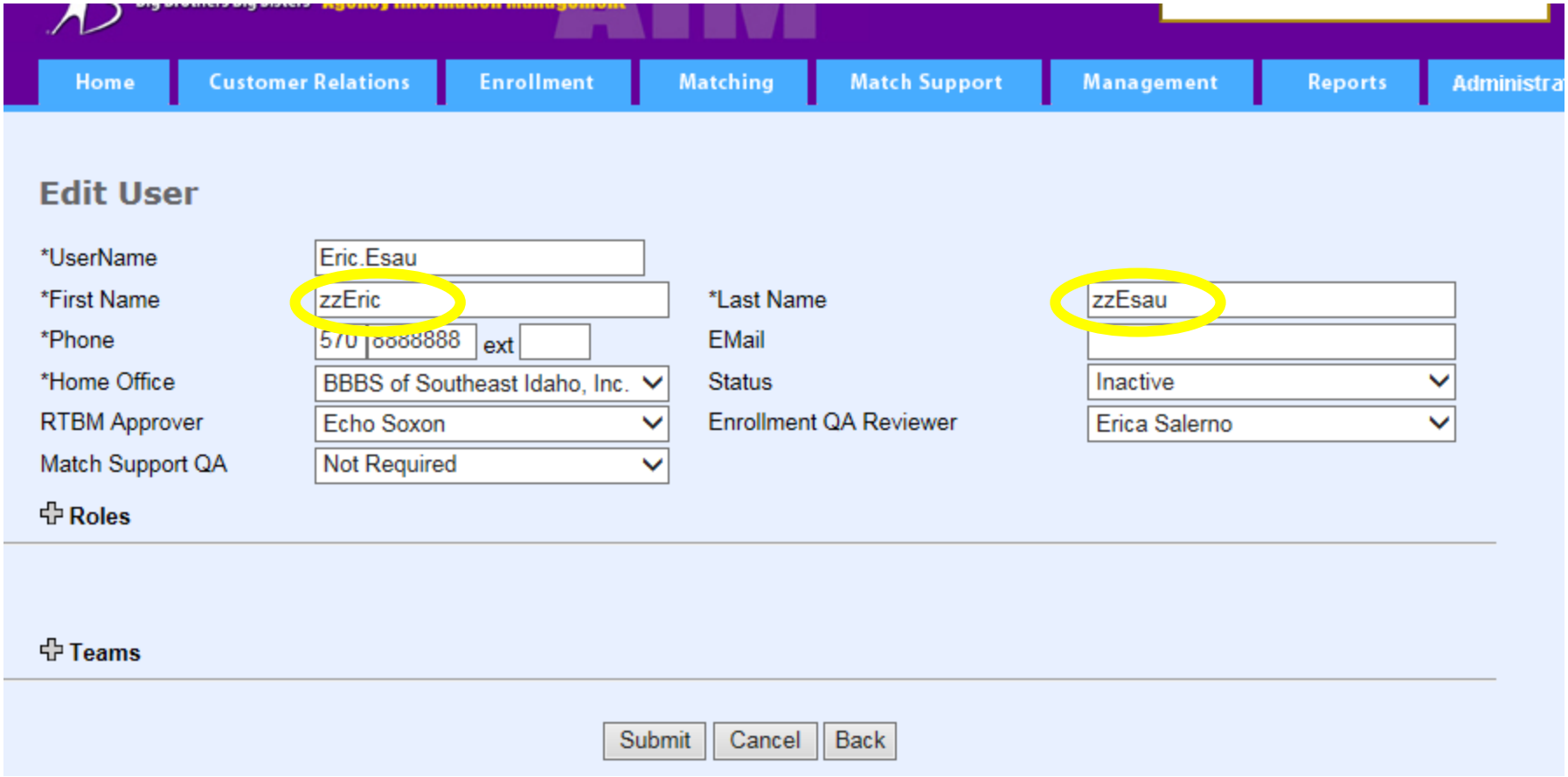
User Roles


Home
Customer Relations
Enrollment
Matching
Match Support
Management
Reports
Administration
Edit User
*UserName
Martina.Franca
*First Name
Martina
*Last Name
Franca
*Phone
208
5230009
ext
EMail
colin.lane@bbbs.org
*Home Office
BBBS of Southeast Idaho, Inc.
Status
Active
RTBM Approver
Erica Salerno
Enrollment QA Reviewer
Erica Salerno
Match Support QA
Not Required
Roles
Agency Admin
2 locations
Add
Confidential
2 locations
Add
Customer Relations
0 locations
Add
Data Correction
0 locations
Add
Enrollment
0 locations
Add
Enrollment Supervisor
2 locations
Add
EnrollmentQAReviewer
2 locations
Add
Management
0 locations
Add
Management with Excel
2 locations
Add
Match Support
0 locations
Add
Match Support Supervisor
2 locations
Add
Matching
0 locations
Add
MatchSupportQAReviewer
2 locations
Add
Read Only User
0 locations
Add
Relocate
0 locations
Add
Report
0 locations
Add
Report with Excel
0 locations
Add

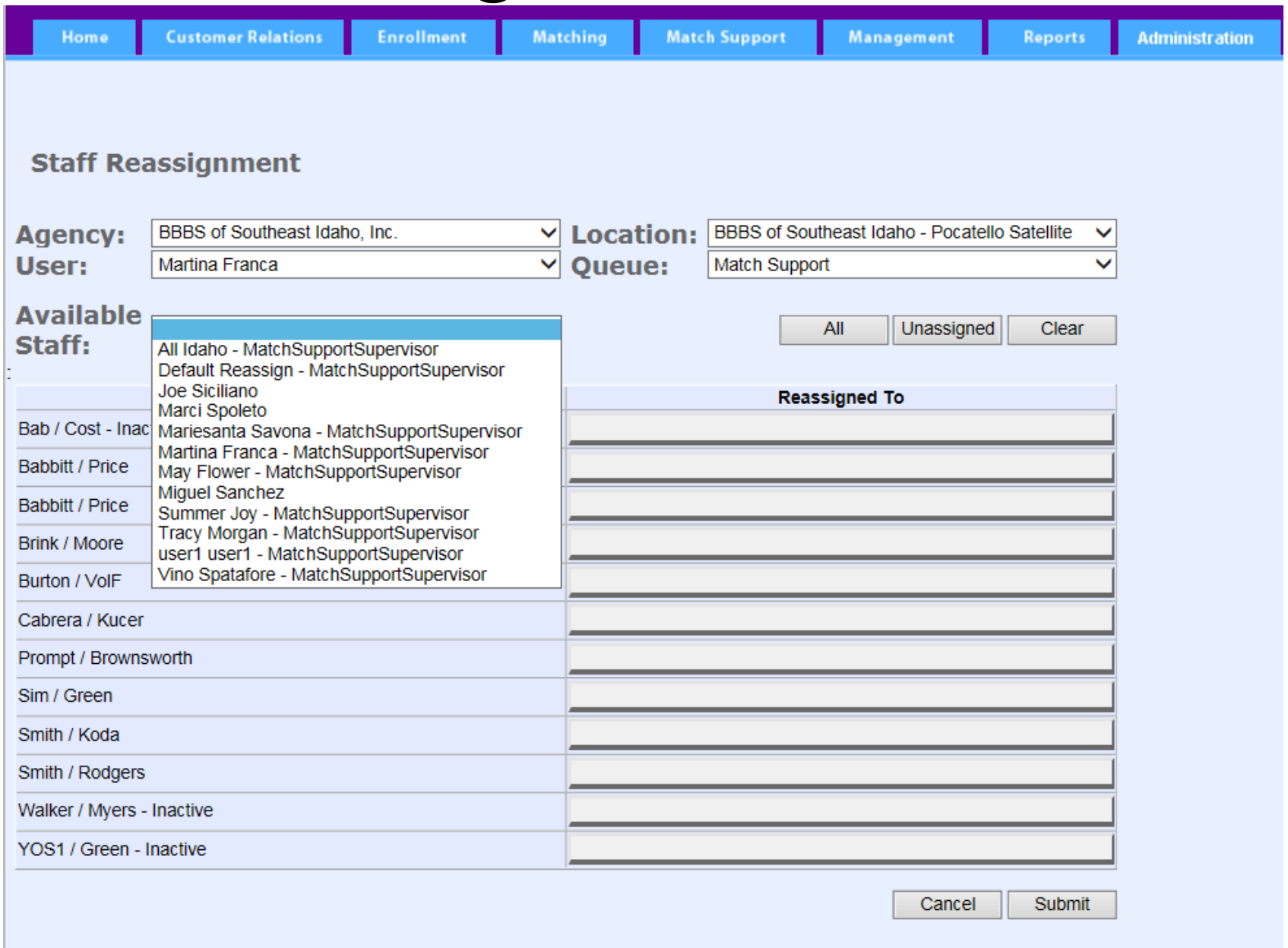
Managing Old Users



Managing Old Users



Reassign Caseloads



Big Brothers Big Sisters

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Enrollment & Match Support Info

Enrollment Tricks

- You can add participants 1 at a time or use an import feature with an excel template you can find in AIM.
- Confidential feature for when Staff or Board members are Bigs
- AIM doesn't like "quotations" in names. Use (parentheses) instead.
- Customize Referral Details for recruitment tracking (can add names even!)
- You can upload PDF or Word Attachment for Interview
- Backing out an RTBM record…

Match Support Tips

- Contacts vs Communication Log
- Saving as “In Progress”
- Print All Feature
- Status of Green / Yellow / Red
- Site-based Summer Contacts in AIM

SB to CB Transfers

- Start process on Match record
  - Add info to Big and RTBM the Volunteer – tah dah!
- Reports show a “HYBRID” Column (Y = transfer match)
- Typically doesn’t count as closed and new match in reports (unless you tell it to by “separating” transfers, default is “combined”)

Customizing AIM

Report Sources

- “Tag” volunteers, children and or/matches
- Commonly used to track grants, media releases, trainings, etc
- Don’t use symbols like &*%$^

Custom Fields

- Can use drop down or text box values
- To pull data in reports you can only pull 1 Report Source of Custom Field data at a time.

Reporting

Basics of AIM Reports

- With Keys includes all the numeric IDs, Without Keys doesn't include them
- If you're using Internet Explorer, it will properly display what filters are available
- Some reports you can't change the dates. If available, you can only select up to 12 months at a time.
- PDF's versus Excel

Common Reports

- **Program Scorecard** – high level, overview information
- **Match History Detail** – gives you children SERVED for the time period
- **Match Detail** – gives you ACTIVE children that day
- **Participant Detail** – gives you participant based on the status you choose, for ALL time on AIM. You cannot set dates. Filter, filter, filter.
- **Quality Assessment** – gives you details on QA reviews done, found on right hand side

Support Contact Agency Summary Report

03/01/2015 - 03/31/2015

User: All

Location: All
Match: Both

Group: All
Status: Active + Completed
Program: All

Team: All
Support: All
Site: All

3/2015

Locations	Total Due	This Period: Total Done	%	On Time	%	Late	%	Not Done	%	Done Late Prior Period	Extra Contact
	2	2	100	1	50	1	50				
	24	20	83	15	63	5	21	4	17		
	423	392	93	312	74	80	19	31	7	26	6
	149	136	91	106	71	30	20	13	9	12	5
	97	91	94	77	79	14	14	6	6	4	2
	6	6	100	4	67	2	33			1	
	103	98	95	78	76	20	19	5	5	9	2
	42	41	98	35	83	6	14	1	2		

Total Due	Total Done	% Done	Done On Time This Period	% On Time	Done Late This Period	% Done Late This Period	Not Done This Period	%	Done Late Prior Period	Extra Contact
846	786	93	628	74	158	19	60	7	52	15

End Period Backlog	End Period Avg Backlog	181+ Days	91-180 Days	61-90 Days	31-60 Days	< 30 Days
80	17			3	17	60

Report Type: Support Contact Agency Summary Report **Date:** 4/29/2015 Page 1 of 1

Individual Staff MSC Data:

- You can pull one for every staff member and get an understanding of individual performance
- You can also use the individual information combined to understand caseload distribution and capacity

Report Name:
Match Support Contact Summary

Average Match Length

- Average months of CLOSED matches in that time period
- SB figure includes matches that have transferred to CB
- Program Scorecard shows you AML or you can pull more detailed report

Retention Rates

Easy Way? Pull a Program Scorecard

How is retention calculated anyway?

To calculate 12-month match retention for 2014:

A.	# new matches made in 2013	78
B.	# of those new matches that lasted 12 months	56
C.	B ÷ A = 12 month retention	72%

So right now, your scorecard's retention figures are pulling:

- only the new matches made during Jan-May 2014 for 12 months
- only the new matches made during Jul-Nov 2014 for 6 month retention

Quality Assurance

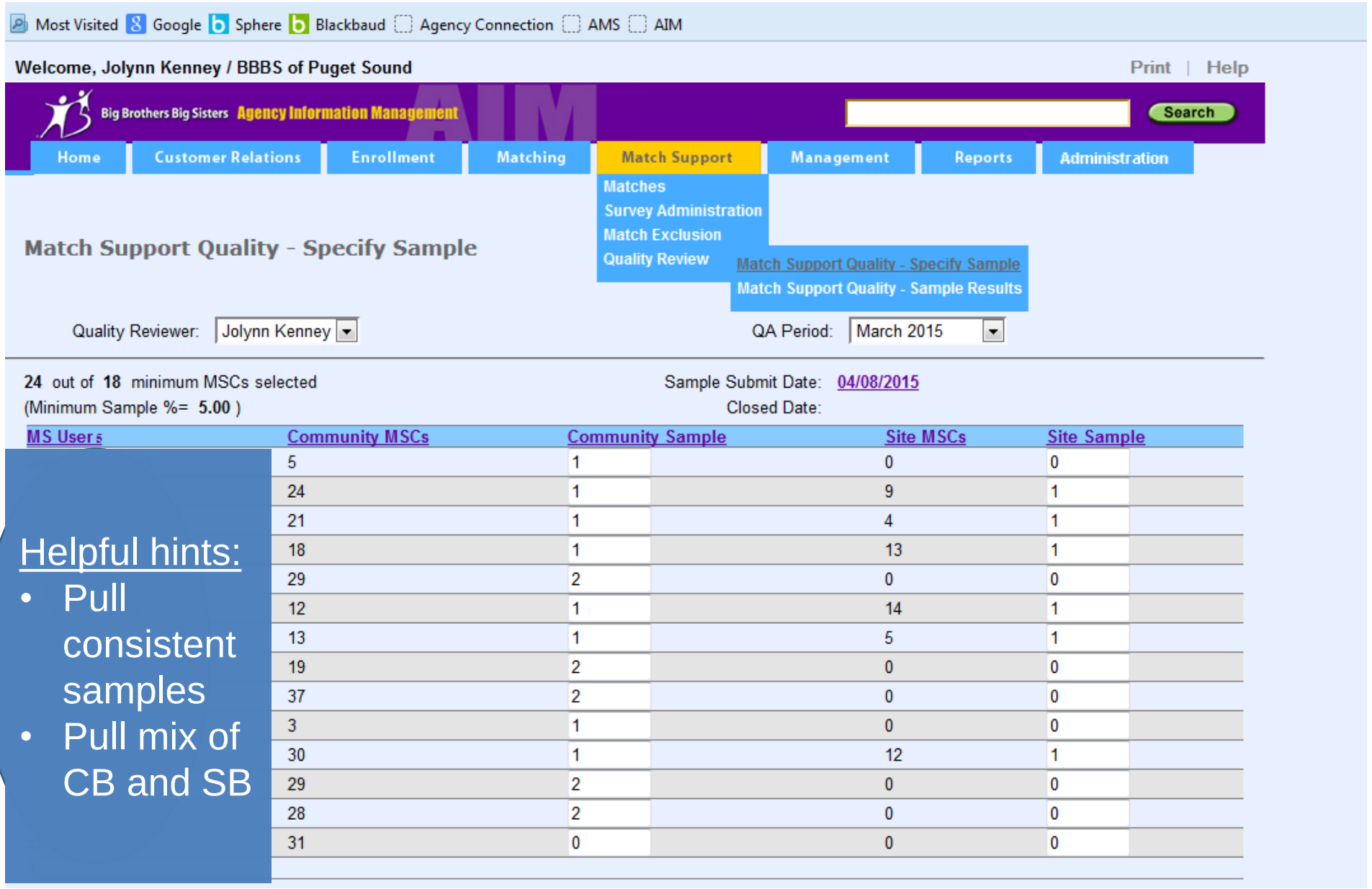
Quality Assurance

- Feature to pull random sample in AIM
- Needs to be done MONTHLY
- Enrollment sample – volunteers made RTBM in prior month
- Match Support sample – only contacts completed ON TIME in prior month
- Set sample size preference on Administration Tab

Quality Assurance

- QA scoring recommendation updated in April 2014
- Content review, not a paperwork review!
- Agency Connection > Home > Operations > Agency Compliance > Quality Assurance > Quality > “Updated Quality Ratings 2014”

QA Samples



Helpful hints:

- Pull consistent samples
- Pull mix of CB and SB

Most Visited | Google | Sphere | Blackbaud | Agency Connection | AMS | AIM

Welcome, Jolynn Kenney / BBBS of Puget Sound Print | Help

Big Brothers Big Sisters **Agency Information Management** AIM

Search

Home | Customer Relations | Enrollment | Matching | Match Support | Management | Reports | Administration

Matches
Survey Administration
Match Exclusion
Quality Review

Match Support Quality - Specify Sample
Match Support Quality - Sample Results

Match Support Quality - Sample Results

Quality Reviewer: Jolynn Kenney

QA Period: March 2015

Sample Submit Date: 04/08/2015

24 MSC records sampled

Closed Date:

Match Name	MS User s	Score	Match Type	Support Level	Comments
McMa		Excellent	C	Green	(Match Score: 5) Jennifer recently did one cont...
Garz		Excellent	S	Green	(Match Score: 5) Match has transitioned to SB+....
Griffi		Poor	C	Green	(Match Score: 2) There are several contacts tha...
Camp		Very Good	S	Green	(Match Score: 3) This SB match is now closing a...
Darin		Very Good	C	Green	(Match Score: 2) There is a lack of focus on o...
Harri		Very Good	C	Green	(Match Score: 2) Lisa has done a good job of in...
Turci		Very Good	S	Green	(Match Score: 4) Match is 1 1/2 years in and on...
Fraus		Very Good	C	Green	(Match Score: 3) This match has struggled to me...
Glen		Excellent	C	Green	(Match Score: 5) This is a new CB match that me...
Byrd		Very Good	S	Green	(Match Score: 4) Match goals have been mentione...
Pome		Excellent	C	Green	(Match Score: 5) This is a newer match and meet...
Ganit		Excellent	S	Green	(Match Score: 5) All areas of support covered c...
Trave		Very Good	C	Green	(Match Score: 4) Different areas of support cov...
Rash		Very Good	C	Green	(Match Score: 3) There are no YDP goals or stra...
Valci		Excellent	C	Green	(Match Score: 3) Taylor has only done one conta...
Mille		Good	C	Green	(Match Score: 3) Match is over a year now and h...
Nette		Very Good	C	Green	(Match Score: x) Megan has done five contacts w...
Dillor		Excellent	C	Green	(Match Score: 5) This match has been reviewed f...
Hung		Excellent	S	Green	(Match Score: 5) This is a brand new BSW match....
Spur			C	Green	
Mann		Excellent	C	Green	(Match Score: 5) This is still a newer match. J...
Peter		Very Good	C	Green	(Match Score: x) This match was reviewed by pre...
Antho		Excellent	C	Green	(Match Score: 1) Match was previously reviewed ...
Hinto		Excellent	C	Green	(Match Score: 5) Karen has supported this match...

1

Helpful hints:

- Don't put it off until the end of the month
- Develop consistent procedures

Surveys

Survey Administration Feature

- **Youth Outcome Survey** and **Strength of Relationship** are REQUIRED.
- You can skip POE and Satisfaction Surveys in mass!
  - Don't use the big gray "Skip" button. It will skip ALL pages of surveys listed.
  - Can't be used for future dates but you can go in weekly and clean them out, for example.

Survey Basics

- Strength of Relationship – REQUIRED
- Youth Outcome Survey – REQUIRED
- *POE and Satisfaction Surveys – optional*
- *Reports for YOS & SOR only update weekly, not nightly*
- E-forms: available (and optional) to send surveys to volunteers
  - Check “Use e-forms” on general tab

Strength of Relationship

- Reports for Match SORs only include participants who are in a match and both had an SOR due.

- 3 Month Cut Off Scores are indicators for premature closures!
  - 4.65 for Littles
  - 3.95 for CB Bigs
  - 3.85 for SB Bigs

Child – SOR Scales

Relationship Quality Dimension	Description	Corresponding SoR Scale	SoR Scale Items & Questions
Centeredness on Youth's Developmental Needs	Responsiveness of mentor to youth's interests and needs for support	"Coping" • Assistance with problem solving and stress management • Emotional support	**1. My Big has lots of good ideas about how to solve a problem.** **2. My Big helps me take my mind off things by doing something with me.** **9. When something is bugging me, my Big listens while I talk about it.**
Conflict	Disagreements and negative emotional experiences	"Lack of Disappointment" • Absence of negative emotional experiences with Big • Items for this scale are reverse-scored	**3. When I'm with my Big, I feel ignored.** **4. When I'm with my Big, I feel mad.** **6. When I'm with my Big, I feel disappointed.** **8. When I'm with my Big, I feel bored.**
Competence	Mentor's ability to develop and sustain a safe and beneficial relationship with a young person	"Safety" • Feelings of safety when with Big	**5. When I am with my Big, I feel safe.**
Centrality	Significance of relationship to youth and mentor	"Importance" • Significance of relationship with Big	**7. My relationship with my Big is very important to me.**
Closeness	Emotional bond and attachment	"Closeness" • Feelings of emotional bond and attachment toward Big	**10. How close do you feel to your Big?**

Volunteer – SOR Scales

Relationship Quality Dimension	Description	Corresponding SoR Scale	SoR Scale Items & Questions
Compatibility	Combinations of personalities, life experiences, and interests that are well-suited to developing a beneficial mentoring relationship	"Connectedness" • Perception of shared interests with Little • Not perceiving difficulties interacting with Little	**3. My Little and I are interested in the same things.** **8. I sometimes feel frustrated with how few things have changed with my Little.** **9. My Little and I are sometimes at a loss for things to talk about.** **12. I get the sense that my Little would rather be doing something else.** **13. My Little has trouble sticking with one activity for very long.**
Competence	Mentor's ability to develop and sustain a safe and beneficial relationship with a young person	"Lack of Frustration" • Absence of negative or challenging experiences as a Big (lack of enjoyment, time demands, overwhelmed by Little's needs) • Items are reverse-scored	**2. I expected that being a Big would be more fun than actually it is.** **5. Being a Big is more of a time commitment than I had anticipated.** **6. I feel overwhelmed by my Little's family difficulties.** **It is hard for me to find the time to be with my Little.**
Competence	Mentor's ability to develop and sustain a safe and beneficial relationship with a young person	"Confidence" • Confidence as a Big • Perceptions of match compatibility and Little improvement	**1. I am enjoying the experience of being a Big.** **4. I feel confident handling the challenges of being a mentor.** **7. My Little has made improvements since we started meeting.** **11. I think my Little and I are well-matched.**
Closeness	Emotional bond and attachment	"Closeness" • Feelings of emotional intimacy and attachment towards Little	**14. I feel close to my Little.**
Centeredness on Youth's Developmental Needs	Responsiveness of mentor to youth's interests and needs for support	"Decision-Making"** Who decides how Big and Little will spend their time together	**15. Which of the following best describes how decisions are usually made about how you and your Little will spend your time together?**

Youth Outcome Survey

- The PDF reports from AIM are accurate but based on very raw data and simple counts.
  - “YOS Outcomes Report” in AIM is ONLY Littles who have a Baseline AND a Follow Up Survey

- Sample size matters. (30 minimum)
- Completion rates matter, especially for small agencies!

- The YOS Infographic has a much more statistically rigorous analysis.
  - Reliable change formula and margin of errors on each scale based on national sample.
  - Effect Size
  - Agency Connection > Home > Service Delivery > Outcomes Evaluation System > YOS

Question
excited
Change
analyze
QUESTION
Informed
wonder
curious