Instructions for the Funnel

The Funnel is presented as an example. Before you can start your analysis, the Funnel will have to be modified to reflect the steps in your program and the reasons families slip through the holes in the Funnel. Below are step-by-step instructions for populating the Funnel, but they will need to be customized for your program with specific information about where to obtain the data for each field. For example, be specific about which data report to run and how to run it. Also, it may be helpful to create an Excel template for the data needed prior to entering it into the Funnel. Once the Funnel and data spreadsheet have been customized, it will be easier to use this tool in the future. The Funnel can be used for an entire program, but larger programs may opt to create the Funnel for subsets of their program (e.g. by team, county). If the data is accurate, you should be able to start at the top, subtract the total listed outside the Funnel for that step and come up with the number for the next step down. You will be amazed at the difference between the number at the top of the Funnel and the number at the bottom. Most programs find many opportunities for growth!

Time Period Determine the time period for the data you will analyze. The same time period must be used for each data point throughout the Funnel. The size of the program may help determine how long you want to make it. For smaller programs, a longer time period may be needed to have enough data to make some determinations about where the challenges lie. Three months can be a good time period, or even six months. For larger programs, a month may be enough. Once the challenges are identified and strategies are put in place, data could be pulled for just those data points and run charts could be created. In that case, using monthly data would make more sense.

1. **# in Target Population** Although you could start with Step 2, starting here allows you to determine if you are reaching all of the potential enrollments in your service area. There is often a huge gap between the number of families in Step 1 and those in Step 2. The eligibility criteria for your program will determine where to look for the data. You should be able to use U.S. Census, Vital Statistics, Kids Count or some other type of public health data. You may have to make an approximation, if you are pulling data from multiple sources. For example, if you enroll pregnant women that are below poverty level and you don't know how many there are, you might be able to determine the % of families in your service area that are below poverty level and apply that to the average # of pregnancies in a given time period. It may not be the exact time period you are using, but make sure you use the most recent three months' worth of data if you are using a three month time period (for example). This number doesn't have to be exact, but you want to estimate the potential number of families that could be served and not just skip the step because you can't find the exact data. If you know the reasons and have data on why your program did not receive referrals, this could be added outside the Funnel. For example, if you are part of a centralized intake system, you may want to subtract out the number of families that go to other program(s).

Instructions for the Funnel

2. **<u># Referrals Received</u>** If you have multiple entry points, you may choose to add additional shapes to depict multiple referral sources. It is always helpful to break down how many referrals are coming in and from where. If you rely solely on a screening process, this shape could be changed to screens or you may have one for screens and one for referrals. Outside of the Funnel, insert the total number of invalid referrals, list all of the reasons families would not move forward to being contacted about your program, and the number for each reason.
3. **<u># to Be Contacted</u>** Insert the number of families that should be contacted. Outside the funnel, insert the total number of families that were not contacted, list all of the reasons families are not contacted, and fill in the data for each reason.
4. **<u># Eligible?</u>** Of those families staff were able to contact, how many are eligible for the program? Insert that number in the diamond shape. If you have an eligibility assessment, you will want to insert another shape above this one to show the two-step process. Outside the funnel, insert the total number of ineligible families, list the reasons families are not eligible, and the number of families for each reason.
5. **<u># Offered Services</u>** Insert how many families were offered services. Outside the Funnel, insert the total number of families that did not enroll, list all of the reasons families do not enroll, and the number for each.
6. **<u># Enrolled Families</u>** Insert how many families were enrolled. Outside the Funnel, insert the total number of closures, all of the reasons that families close, and the number for each.