

# TRACKING THE REENTRY PHASE FOR INDIVIDUALS AT LEGENDARY LEGACIES



WPI

CHENHAO LI, VAGMI BHAGAVATHULA,  
COLE OUELLETTE, NIKOLA GROZDANI



# ***Tracking the Reentry Phase for Individuals at Legendary Legacies***

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By  
Cole Ouellette  
Vagmi Bhagavathula  
Nikola Grozdani  
Chenhao Li

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Worcester Polytechnic Institute  
Professor Laura Roberts

Legendary Legacies  
Ronald Waddell

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# Abstract

Reentry in the U.S. is a complicated and multifaceted issue with many challenges facing justice-involved individuals. In collaboration with Legendary Legacies, our team developed a new approach to evaluating data in the reentry space. While historically, data collected regarding program participants have been primarily quantitative, the secret to fostering positive change may lay in the qualitative aspects of a person's character. Through interviews with Legendary Legacies' staff, our team identified the 15 most pertinent themes to investigate, including emotional expression, trust, and punctuality. With this information, we proposed a new way to track "success" for individuals post-incarceration.

# Executive Summary

## The Criminal Justice System provides limited support for individuals post-incarceration

The imprisonment rate in the United States has grown by over 500% in the last 40 years (Committee on Causes and Consequences of High Rates of Incarceration et al., 2014, p. 13). The U.S. spends billions in funding on policing and incarceration but little on reentry efforts. Of the \$1.3 billion Department of Justice Criminal Justice Reform-related budget, 12% is allocated for reentry (Crowley, 2021).

In an ideal world, the reentry phase will prepare the individual for employment, safe housing, identification, and treatment services. However, the unemployment rate for those who have experienced incarceration is approximately five times that of the general U.S. population (Couloute & Kopf, 2018), and fifty-two percent of the 2,000 people leaving correctional management each day will later become reincarcerated (Harris et al., 2010). With the limited funding, appropriately addressing reentry necessary for successful reentry seems near-impossible.

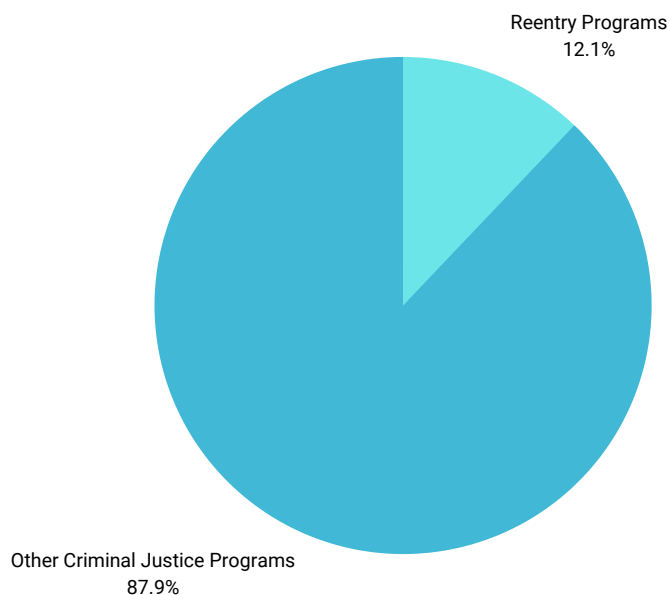


Figure 1: Funds to the reentry programs

## Failure to meet the needs of justice-involved persons can leave lasting damage

Low levels of social support can increase one's risk of mortality and mental illness (Solbakken & Wynn, 2022). A study by Western et al. (2015) claims that approximately 70% of individuals post-incarceration primarily spend their first weeks following release alone. The strictness of institutional routines, time schedules, and security measures of prisons offer individuals little to no contact with friends and family (Solbakken & Wynn, 2022). This lack of social interaction weakens the bond with loved ones, making it very difficult for men post-incarceration to get off on the right foot because they are left with no one to reach out to for help.

Suicide risk among individuals post-incarceration was 18 times higher than the general population (Haglund et al., 2014). Twenty-five percent of formerly incarcerated individuals are diagnosed with bipolar disorder or schizophrenia, and up to 56% indicate they struggle with mental health challenges (Fahmy, 2021).



## Non-profit reentry organizations support the community with a new approach

Reentry organizations understand that individuals post-incarceration cannot always access the proper resources needed to become successful. Organizations acknowledge the lack of support individuals receive after their release from correctional management and aim to reintegrate their participants into the broader community by providing connections to support services and generating experience in specific fields such as social programs and employment.



Figure 2: LL Logo



Figure 4: ROCA Logo



Figure 3: UTEC Logo

### Sponsor Organization - Legendary Legacies

Legendary Legacies (LL), a non-profit organization in Worcester, Massachusetts, offers young Black and Latino men an opportunity to develop professional life skills through coaching. With a dedicated team of trained Life Coaches, LL has supported individuals post-incarceration through mentoring, community outreach, family support services, and recreational and service opportunities since 2019.

While Legendary Legacies already understands the importance of qualitative data, they are looking for assistance in developing a sustainable plan for tracking qualitative data over time. LL currently tracks data required from the State and other funders and would like to expand on that by tracking qualitative data showcasing the organization's success working with its participants.

## Project Overview

Our project identified methods to track qualitative key performance indicators of successful reentry and fostered data-informed decision-making at Legendary Legacies. We developed the following three objectives to meet our goal:

Objective 1: Gain an understanding of the data collection process at Legendary Legacies

Objective 2: Investigate established means to measure qualitative key performance indicators at other reentry organizations

Objective 3: Iteratively develop a plan to implement a new strategy for tracking successful reentry at Legendary Legacies

We decided to implement semi-structured interviews to accomplish the objectives above. After gathering qualitative and quantitative information about data collection in reentry programs, we constructed a comprehensive proposal for Legendary Legacies, detailing the optimal assessment strategy to observe several difficult-to-pinpoint indicators during engagements.



## Project Deliverables

Our project identified and recommended data-collection strategies that evaluate qualitative key performance indicators (KPIs), including a person's well-being, relationships, and accountability. We provided the Life Coaches with a Post-Engagement Data Entry Form (PEDEF) and observable behaviors to be incorporated into engagements with participants, addressing specific qualitative indicators weekly. The PEDEF is a three-page document utilizing a series of binary fields and Likert scales to measure a coach's observations following each engagement with a participant. With this form, Life Coaches can track the participants' progress over time and highlight their improvements in some aspects.

## There is a need for collecting qualitative data in the reentry space

The current quantitative data collection isn't indicative of any incremental changes and fails to speak to the impact of the program on its participants. Throughout all semi-structured interviews, we saw a universal desire to collect data on qualitative KPIs that tell the complete story. Coaches at reentry witness qualitative indicators in their everyday engagements with participants but don't keep a formal record of such KPIs.

# Life Coaches value well-being, relationships, and accountability

We analyzed interview data to develop themes from the responses we heard from our conversations with Life Coaches at Legendary Legacies. From the nine interviews conducted, we derived 15 qualitative indicators that fall under the categories of Well-Being, Relationships, and Accountability.

## *Frequent Responses*

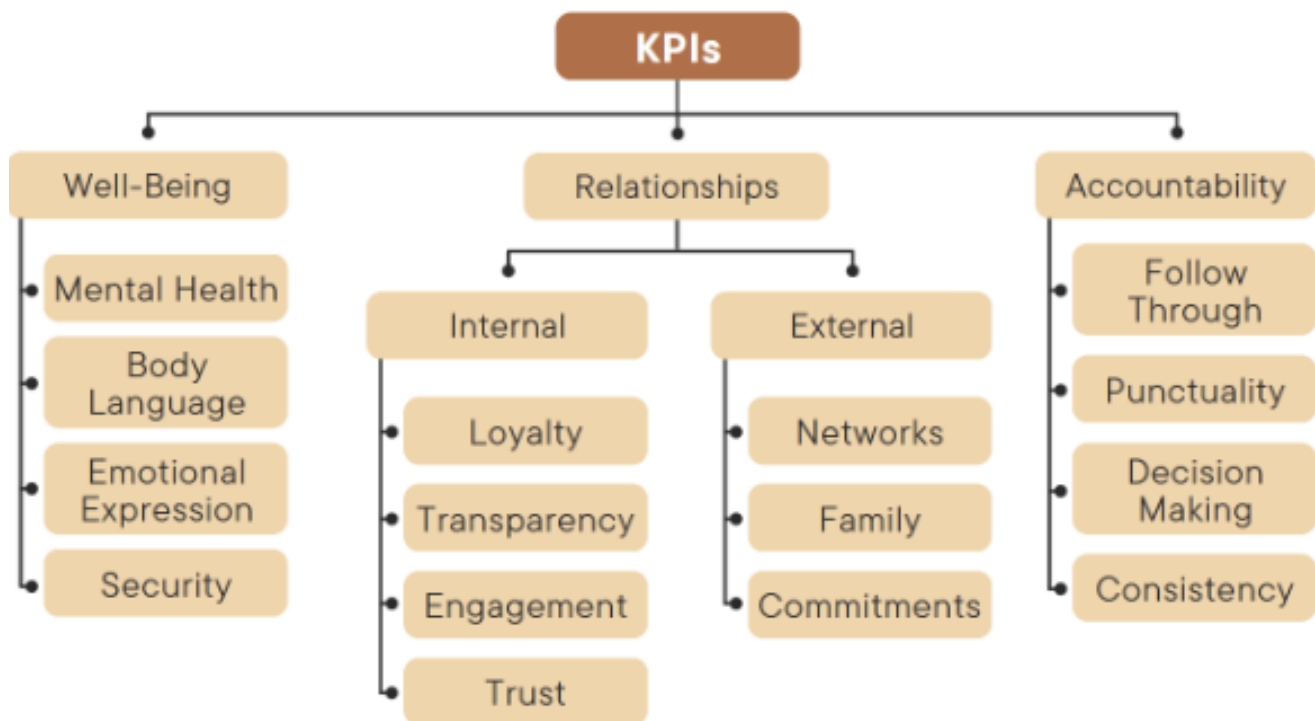


Figure 5: Frequent Responses from Life Coach Interviews

## The commonly utilized data collection methods look only at quantitative statistics

The gold standard of reentry assessment tools is the Ohio Risk Assessment System (ORAS), an exhaustive form that scores an individual's risk across 7 domains: (1) Criminal History, (2) Education, Employment, and Financial Situation, (3) Family and Social Support, (4) Neighborhood Problems, (5) Substance Use, (6) Peer Associations, and (7) Criminal Attitudes and Behavioral Patterns. Questions asked by the ORAS are largely binary and fail to account for the context that helps develop a deeper understanding of where a participant's needs come from.

## Heavily assessing program participants is not desirable for anyone involved

From their first encounter with the criminal justice system and throughout the reentry phase, participants undergo a high volume of assessments from corrections and parole officers. Each Life Coach at Legendary Legacies works with an average of 8 participants with several advising more than 10 at any given time. Implementing even just a ten-minute post-engagement assessment to fill in the gaps left from the biyearly assessment would add over 2 hours of extra work to a Life Coach's week.

## Transparent, noninvasive assessments can promote a desire for growth in participants

Transitional coaches at UTEC implement weekly reflection plans with participants. Personalized plans allow participants to set goals for themselves and reflect on what needs to be done to achieve their goals week over week. Reentry experts all agree that the only person capable of making lasting change is oneself. Being transparent with a participant about expectations that they have set for themselves is the best way to encourage prosocial behavior.

## Recommendations

Considering our findings, we have developed three recommendations that Legendary Legacies can implement to increase program efficiency and foster data-informed decision-making.

## Utilize Post-Engagement Data Entry Form to track qualitative KPIs

We recommend that Legendary Legacies implement our PEDEF in their proprietary database. After hearing feedback from LL's Life Coaches, we created the PEDEF by taking the most favorable aspects of the ORAS and condensing the assessment to be completed frequently with minimal headache. The Post-Engagement Data Entry Form is not meant to replace the ORAS, but rather to be a supplemental observational assessment frequently recording qualitative analytics.

To streamline the data entry process, the PEDEF is split into two sections. The first page addresses punctuality, trust, and body language. The Life Coaches are expected to complete the fields on this page after every engagement they have with participants. The fields on the remaining pages cover mental health, emotional expression, security, transparency, engagement, networks, and decision-making themes that might not always come up in conversation but should be recorded when applicable.

## Scales to interpret collected data

Recording data provides no benefit without also being able to assess changes in qualitative indicators over time. We recommend that Legendary Legacies use the scales we have provided to quantify where a participant is at in meeting their goal.

The Post-Engagement Data Entry Form records fields including “Is the participant in control of events in their life?” and “How satisfied is the participant with the support he has received from his family or close friends?” on a 7-point scale, allowing for a range of responses that best reflect growth over time. Other fields are on a 4-point scale to force Life Coaches to lean towards an extreme and eliminate possible misinterpretation of a midpoint.

Fields such as “Did the participant show up?” or “Did the participant reveal something new during this engagement?” use Yes or No checkboxes to record binary information. However, we recognize that context is important, so the former question splits the Yes response into “Yes, on time” and “Yes, late” while the latter is followed by the open response “If yes, what?” This added context provides depth to the question and can help show growth where normal binary data fails to.

## Future project in collaboration with WPI

There is still a large potential for growth at Legendary Legacies. This project is the first stepping stone on the long journey to change the way “success” is thought about and assessed for individuals post-incarceration. We recommend that Legendary Legacies collaborates with WPI in a future IQP or MQP to pick up where our work has left off and continue investigating the link between qualitative indicators and success for men post-incarceration.

## Conclusion

Engraved on the Legendary Legacies logo is Proverbs 13:22: “A Good man leaves an inheritance to his children's children, but the wealth of the sinner is stored up for the righteous.” A man that does not live up to the principles of righteousness will yield ramifications in the future. Although, there always exists a path to righteousness and those who seek that journey will be blessed with value to pass into the future. During our project, we have determined that there are no shortcuts in the reentry phase. However, we also found that the current criminal justice system sets up individuals post-incarceration in a position for failure. Reentry organizations, such as Legendary Legacies, focus on rebuilding that path to righteousness for these participants.

# Acknowledgements

Our team would like to thank Legendary Legacies and WPI for allowing us to pursue this project and Mr. Ron Waddell for his guidance and wisdom. We hope that Legendary Legacies continues to partner with WPI to offer other students a chance to learn more about their organization and assist them with future projects.

This would not have been possible without the support of our advisor, Professor Laura Roberts. Laura, we thank you for your continued patience, feedback, and unparalleled support throughout the project.

We must also thank Ms. Lili Elkins and Mr. Sako Long for taking time out of their day to discuss the data collection process at their respective organizations and to Professor Andrew C. Trapp for his insight while designing our Post-Engagement Data Entry Form.

Lastly, many thanks to Eddie “Bebe” Lavergene, Miguel Reyes, Edgardo Pizarro, Gabriel Rodriguez, Junito Ramos, John Graham, the Life Coaches we met at Legendary Legacies, for welcoming us into the organization and sharing the importance of their work with us.

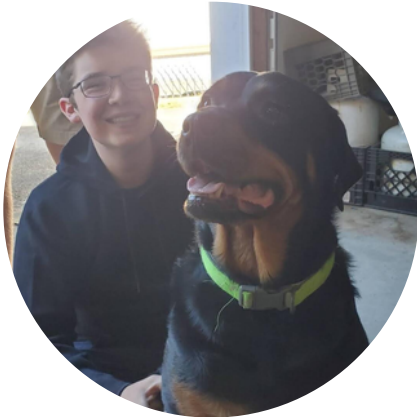
# Authorship

Section	Author	Primary Editor
Abstract	Cole Ouellette	Cole Ouellette
Acknowledgements	All	All
Executive Summary	Cole Ouellette	Cole Ouellette
1. Introduction	Cole Ouellette	Chenhao Li
2. Background	Vagmi Bhagavathula	Cole Ouellette
2.1 The Criminal Justice System provides limited support for individuals post-incarceration	Chenhao Li	Nikola Grozdani
2.2 Failure to meet the needs of justice-involved persons can leave lasting damage	Nikola Grozdani	Vagmi Bhagavathula
2.3 Non-profit reentry organizations support the community with a new approach	Chenhao Li	Vagmi Bhagavathula, Nikola Grozdani
2.4 Legendary Legacies needs assistance making data-informed decisions	Vagmi Bhagavathula	Nikola Grozdani
3. Methodology	Cole Ouellette	Nikola Grozdani
3.1 Objective 1	Vagmi Bhagavathula	Nikola Grozdani
3.1.1 Semi-Structured Interviews with Legendary Legacies' Administration and Life Coaches	Vagmi Bhagavathula	Nikola Grozdani
3.1.2 Plotting a Map	Vagmi Bhagavathula	Nikola Grozdani
3.2 Objective 2	Cole Ouellette	Vagmi Bhagavathula
3.2.1 Semi-Structured Interviews with Reentry Experts	Chenhao Li	Vagmi Bhagavathula
3.2.2 Semi-Structured Interview with Mathematical Modeling Expert	Nikola Grozdani	Cole Ouellette
3.2.3 Archival Research	Nikola Grozdani	Cole Ouellette



3.3 Objective 3	Nikola Grozdani	Cole Ouellette
3.3.1 Post-Engagement Data Entry Form	Cole Ouellette	Chenhao Li
3.3.2 Iterative Development	Nikola Grozdani	Cole Ouellette
3.4 Limitations	Vagmi Bhagavathula	Cole Ouellette
4. Findings & Analysis	Nikola Grozdani	Vagmi Bhagavathula
4.1 There is a need for collecting qualitative data in the reentry space	Nikola Grozdani	Vagmi Bhagavathula
4.2 Life Coaches value well-being, relationships, and accountability	Nikola Grozdani	Vagmi Bhagavathula
4.3 The commonly utilized data collection methods look only at quantitative statistics	Cole Ouellette	Chenhao Li
4.4 Heavily assessing program participants is not desirable for anyone involved	Vagmi Bhagavathula	Cole Ouellette
4.5 Transparent, noninvasive assessments can promote a desire for growth in participants	Vagmi Bhagavathula	Cole Ouellette
5. Recommendations	Cole Ouellette	Cole Ouellette
5.1 Utilize Post-Engagement Data Entry Form to track qualitative KPIs	Cole Ouellette	Cole Ouellette
5.2 Scales to interpret collected data	Cole Ouellette	Cole Ouellette
5.3 Future project in collaboration with WPI	Cole Ouellette	Cole Ouellette
6. Conclusion	Vagmi Bhagavathula	Cole Ouellette
Appendices	All	All

# Meet the Team



**Cole Ouellette** is a Computer Science and Cybersecurity student at WPI. Outside of the classroom, Cole spends time tinkering with Adobe Photoshop and practices typing as fast as possible.



**Vagmi Bhagavathula** is pursuing a double major in Computer Science and Data Science. His hobbies include crafting articles on the NFL, providing his own data analysis, and hanging out with friends outside of work.



**Nikola Grozdani** is a Computer Science student at WPI. He has a strong interest and passion in Software Development. On his free time, he likes to work on personal programming projects, spend time with friends and family, read books, and go on car drives.



**Chenhao Li** is pursuing a Bachelor's degree in Mechanical Engineering. He has a great interest in mechanical design. He enjoys designing and building interesting projects during his free time.

# CONTENTS

01.	Page 1
Introduction	
02.	Page 2
Background Chapter	
03.	Page 11
Methology	
04.	Page 19
Findings	
05.	Page 25
Recommendation	
06.	Page 31
Conclusion	
07.	Page 32
Reference	
08.	Page 35
Appendix	

# List of Figures

Page ii	Figure 1: Funds to the reentry programs
Page iv	Figure 2: LL Logo
Page iv	Figure 3: UTEC Logo
Page iv	Figure 4: ROCA Logo
Page vii	Figure 5: Frequent Responses from Life Coach Interviews
Page 3	Figure 6: Funds to the reentry programs
Page 4	Figure 7: Massachusetts Department of Correction Reentry Continuum
Page 7	Figure 8: LL logo
Page 7	Figure 9: ROCA logo
Page 7	Figure 10: UTEC logo
Page 8	Figure 11: Ron Waddell
Page 8	Figure 12: LL Life Coaches
Page 9	Figure 13: Activity
Page 15	Figure 14: UTEC and Sako
Page 15	Figure 15: ROCA and Lili
Page 15	Figure 16: WPI and Andrew C Trapp
Page 17	Figure 17: Frequent Responses from Life Coach Interviews
Page 22	Figure 18: Matching KPIs with ORAS questions
Page 23	Figure 19: Preview of Ohio Risk Assessment System: Community Supervision Tool
Page 26	Figure 20: Data Entry Form
Page 27	Figure 21: Data Entry Form
Page 29	Figure 22: Data Entry Form

# 1

## Introduction

Individuals with a history in the justice system are criminally underserved. Especially after incarceration, this population faces societal stigma and several obstacles that make it difficult for anyone to move forward and leave the past behind.

In Worcester, Massachusetts, Legendary Legacies is a reentry organization trying to make a difference in the community and the lives of everyone coming through their program. This year, we worked alongside Legendary Legacies to change the way “success” is thought about and assessed for individuals post-incarceration.

Historically, reentry organizations and funding agencies have focused on a relatively small set of quantitative key performance indicators to understand an individual’s success and self-betterment. Typically, the indicators in question consist of surface-level factors that may not accurately reflect the whole picture. However, the folks at Legendary Legacies believe there’s more to consider when assessing someone’s success post-incarceration. The strength of a relationship, quality of employment, healthy habits, and education are some of the key qualitative indicators that Legendary Legacies believe play an important role in the reentry process.

This project made recommendations to Legendary Legacies for ways they can track qualitative indicators and change the way reentry programs gauge success. The following chapters detail background information about failures in the existing Criminal Justice program, factors that impact success post-incarceration, reentry programs, methods used to accomplish the project goal, and our findings and recommendations to increase the support reentry organizations can provide their participants.

# 2

## Background Chapter

This chapter lays out the background information necessary to understand how the criminal justice system impacts individuals facing problems. First, we discuss the U.S. Criminal Justice System's incarceration and budget rates. Next, we analyze the importance of assistance programming for individuals post-incarceration with a focus on shortcomings at the governmental level. Third, we introduce non-profit organizations as an alternative solution. Finally, we examine our sponsor, Legendary Legacies, and their need for this project.



## 2.1 The Criminal Justice System provides limited support for individuals post-incarceration

The imprisonment rate in the United States has grown by over 500% in the last 40 years (Committee on Causes and Consequences of High Rates of Incarceration et al., 2014, p. 13). While 4.25% of the world's population resides in the United States, American penitentiaries hold nearly 25% of the world's incarcerated population (Committee on Causes and Consequences of High Rates of Incarceration et al., 2014, p. 13; "United States population," 2022). Nearly 1 in 100 adults are sentenced to correctional institutions, almost ten times greater than incarceration rates in Western Europe and other democracies (Committee on Causes and Consequences of High Rates of Incarceration et al., 2014, p. 13).

The U.S. spends billions in funding on policing and incarceration but little on reentry efforts. Of the \$1.3 billion Department of Justice Criminal Justice Reform-related budget, 12% is allocated for reentry (Crowley, 2021). The lack of accessibility to the reentry programs that the U.S. Criminal Justice System provides its prisoners is one of the major contributing factors to this rising rate of imprisonment.

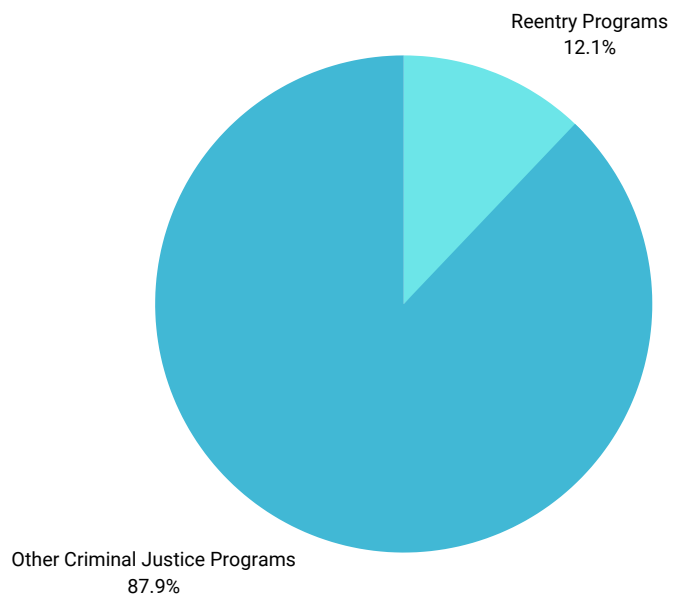


Figure 6: Funds to the reentry programs

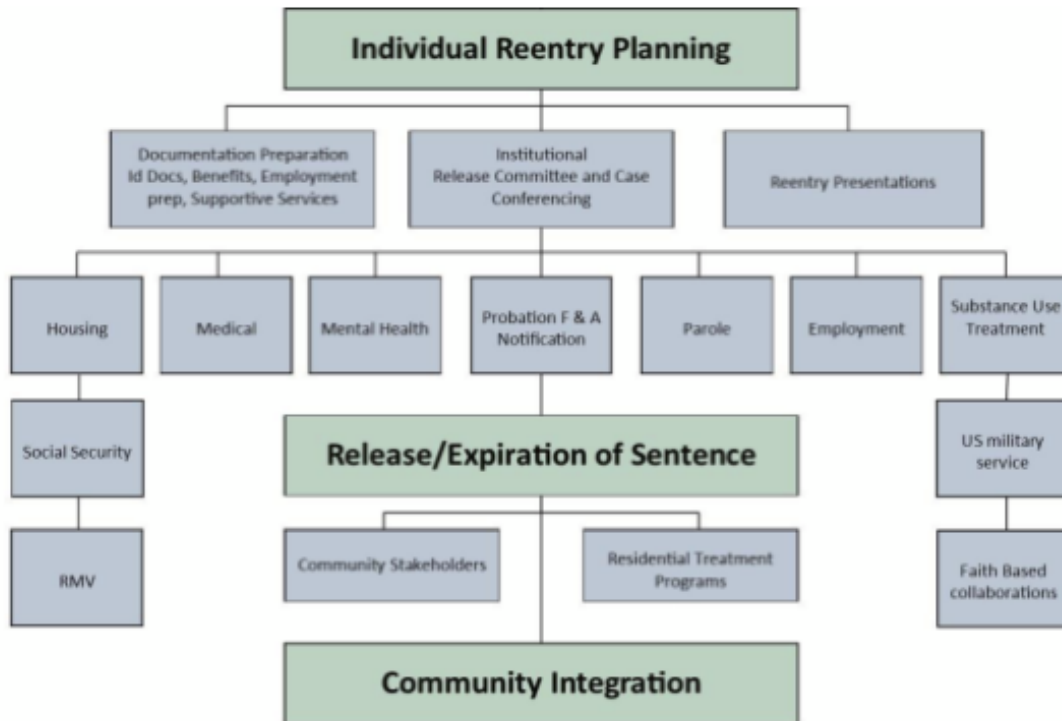


Figure 7: Massachusetts Department of Correction Reentry Continuum

Note. From Program Description Booklet, by C. A. Mici, 2021 (<https://www.mass.gov/doc>

[/program-description-booklet-2/download?\\_ga=2.132102855.955604256.1549903914-1459834499.1543502241](https://www.mass.gov/doc/program-description-booklet-2/download?_ga=2.132102855.955604256.1549903914-1459834499.1543502241)).

As shown in Figure 1, reentry is a multifaceted process that requires all components working harmoniously to be successful. In an ideal world, the reentry phase will prepare the individual for employment, safe housing, identification, and treatment services. This holistic preparation for reentry showed that participants with stable housing and jobs were 40% less likely to recidivate and significantly more likely to receive substance abuse and mental health services (Burrowes, 2019).

The unemployment rate for those who have experienced incarceration is approximately five times that of the general U.S. population (Couloute & Kopf, 2018). Fifty-two percent of the 2,000 people leaving correctional management each day will later become reincarcerated (Harris et al., 2010). Criminologist Joan Petersillia (2003) claims that only 33% of released individuals receive career preparation while in prison (p. 93). With the limited funding, appropriately addressing all areas necessary for successful reentry seems near-impossible. As difficult as it may be, each point is critical in setting a justice-involved individual up for the best outcome.



## 2.2 Failure to meet the needs of justice-involved persons can leave lasting damage

Social support is the perception that one is cared for by a network of family, friends, and community members (National Cancer Institute, n.d.). Sufficient levels of social support are paramount to an individual's mental health and well-being. In contrast, low levels of social support can increase one's risk of mortality and mental illness (Solbakken & Wynn, 2022).

A study by Western et al. (2015) claims that approximately 70% of individuals post-incarceration primarily spend their first weeks following release alone. Rather than participating in reentry programs or spending time with friends and family, individuals post-incarceration consume that time in solitude away from society. Intense loneliness and lack of social interaction can deteriorate well-being and mental health. Studies have shown that suicide risk among individuals post-incarceration was 18 times higher than the general population (Haglund et al., 2014). Twenty-five percent of formerly incarcerated individuals are diagnosed with bipolar disorder or schizophrenia, and up to 56% indicate they struggle with mental health challenges (Fahmy, 2021).

While prisons provide individuals with some opportunities to socialize with visitors, the poorly designed system harms individuals post-incarceration more than it benefits them. The strictness of institutional routines, time schedules, and security measures of prisons offer individuals little to no contact with friends and family (Solbakken & Wynn, 2022). This lack of social interaction weakens the bond with loved ones, making it very difficult for men post-incarceration to get off on the right foot because they are left with no one to reach out to for help.

While existing federal reentry efforts can provide individuals with the skills they need to overcome obstacles, the resources are limited. Duwe and Clark (2014) found that someone obtaining a secondary degree from an educational program while in correctional management is 59% more likely to find a job within two years of release than those who do not.

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According to an Ohio study polling incoming inmates, 68% of respondents stated that they were “very likely” to partake in a program aimed at teaching career skills during their incarceration period, more than twice the amount of those who underwent such programs (Petersillia, 2003, p. 97). The low participation rates in correctional programs are not due to a lack of interest but rather a lack of availability. To shift the paradigm of reentry’s current treatment, Non-profit organizations aim to fill in these gaps left by the government’s approach.

## 2.3 Non-profit reentry organizations support the community with a new approach

Non-profit reentry organizations understand that individuals post-incarceration cannot always access the proper resources needed to become successful post-incarceration. Representatives of the organizations understand the flaws within the criminal justice system and the negative impact these flaws inflict on their participants, who seek to leave their past behind and strive to become better people. Organizations acknowledge the lack of support individuals receive after their release from correctional management. Organizations also aim to reintegrate their participants into the broader community by providing connections to support services and generating experience in specific fields such as social programs and employment.



Figure 8: LL logo



Figure 9: ROCA logo

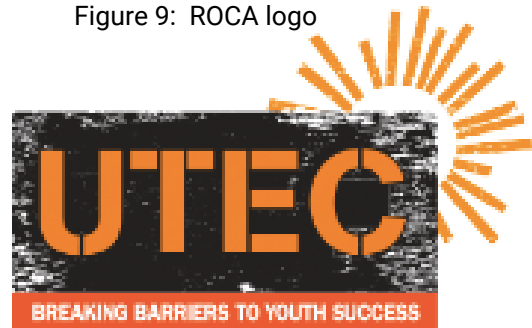


Figure 10: UTEC logo

Legendary Legacies (LL), a non-profit organization in Worcester, Massachusetts, offers young Black and Latino men an opportunity to develop professional life skills through coaching. Since 2019, LL has supported individuals post-incarceration through mentoring, community outreach, family support services, and recreational and service opportunities.



Figure 11: Ron Waddell

With a dedicated team of trained Life Coaches, Legendary Legacies' mission emphasizes healthy relationships with their participants. LL's Life Coaches guide participants to develop independence and build meaningful relationships. In doing so, Legendary Legacies hones the potential and strengths of its participants rather than combating deficit behavior directly. Typically, reentry programs focus on developing employment skills and financial security. However, LL focuses more on the qualitative aspects and human interaction between participants, motivating them to improve on various themes that determine productivity.



Figure 12: LL Life Coaches

## 2.4 Legendary Legacies needs assistance making data-informed decisions

While Legendary Legacies already understands the importance of qualitative data, they are looking for assistance in developing a sustainable plan for tracking qualitative data over time. LL currently tracks data required from the State and other funders and would like to expand on that by tracking qualitative data showcasing the organization's success working with its participants. Our project identified and recommended data-collection strategies that evaluate qualitative key performance indicators (KPIs), including a person's well-being, relationships, and accountability. We provided the Life Coaches with a Post-Engagement Data Entry Form (PEDEF) and observable behaviors to be incorporated into engagements with participants, addressing specific qualitative indicators weekly. With these questions, Life Coaches can track the participants' progress over time and highlight their improvements in some aspects.

LL will be able to use the data to make data-informed decisions while monitoring their participants' progress at a higher level. Life Coaches can now monitor their participants' progress toward specific qualitative indicators from a data-oriented approach. LL can also present tangible data regarding these qualitative key performance indicators to funders, highlighting the success within their organization.



Figure 13: Activity

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A Good man leaves an inheritance to his children's children, but the wealth of the sinner is stored up for the righteous.

Proverbs 13:32

# 3

## Methodology

Our project identified methods to track qualitative key performance indicators of successful reentry and fostered data-informed decision-making at Legendary Legacies. As a result of our preliminary background research, we looked beyond the surface-level key performance indicators. With this consideration in mind, we developed the following three objectives to meet our goal:

### **Objective 1**

Gain an understanding of the data collection process at Legendary Legacies

### **Objective 2**

Investigate established means to measure qualitative key performance indicators at other reentry organizations

### **Objective 3**

Iteratively develop a plan to implement a new strategy for tracking successful reentry at Legendary Legacies

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We decided to implement semi-structured interviews to accomplish the objectives above. After gathering qualitative and quantitative information about data collection in reentry programs, we constructed a comprehensive proposal for Legendary Legacies, detailing the optimal assessment strategy to observe several difficult-to-pinpoint indicators during engagements.

The following sections explain how we met all objectives and generated the final deliverable to present to the project sponsor.

“

**"REPUTATION AND TRUST  
ARE MY CURRENCY"**

-- RON WADDELL

”



## 3.1 Objective 1: Gain an understanding of the data collection process at Legendary Legacies

Our team's goal was to provide Legendary Legacies with recommendations for tracking qualitative key indicators that are important for successful reentry. To identify such indicators, we took inventory of what data Legendary Legacies currently collects, by whom, for whom, and what additional indicators they want to track. We spoke with stakeholders at the sponsor organization and discussed their needs for tracking data and showcasing it to funders. After collecting this information, we developed a map detailing the trail of data collection in the current system and identifying areas for improvement.

### 3.1.1 Semi-Structured Interviews with Legendary Legacies' Administration and Life Coaches

We spoke with the Life Coaches individually to develop a complete understanding of the statistics Legendary Legacies tracked. The Life Coaches have extensive criminal justice backgrounds and are actively involved in the community. Our discussions with the 6 coaches provided insight into what data points they tracked and helped identify any omitted indicators. We conducted interviews via Zoom or a phone call and recorded each for record purposes. Appendix A contains the interview plan used with the Life Coaches.



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### 3.1.2 Plotting a Map

After speaking with the Life Coaches, we transcribed the audio recordings from the interviews and dissected each. We picked out every indicator that the coaches mentioned, filtered similar themes, and grouped the results under the three categories that revealed themselves. We found 15 qualitative indicators falling under Well-Being, Relationships, and Accountability.

### 3.2 Objective 2: Investigate established means to measure qualitative key performance indicators at other reentry organizations

After identifying the qualitative indicators, we investigated various assessment forms that evaluate qualitative key performance indicators. Along with doing archival research, we contacted and met with representatives from two leading organizations at the forefront of the reentry space.

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### 3.2.1 Semi-Structured Interviews with Reentry Experts

Before conducting interviews, we developed an outline to steer the conversation and address all points of questioning. Appendix B includes our sample outline of interviews with reentry experts. We reached out to fifteen reentry organizations, received responses from four, and met with two representatives.

We had the opportunity to speak 1-on-1 with Ms. Lili Elkins from Roca and Mr. Sakieth “Sako” Long of the United Teen Equality Center (UTEC). Roca is committed to disrupting incarceration, poverty, and racism by engaging young adults to address issues, find hope, and drive change. UTEC strives to transform the ambition of disconnected young adults into social and economic success. Both reentry organizations are leaders in the space; our conversations with Ms. Lili Elkins and Mr. Sako Long taught us more about the data collection processes at reentry organizations beyond LL.



Figure 14: UTEC and Sako



Figure 15: Roca and Lili



Figure 16: WPI and Andrew C Trapp

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## 3.2.2 Semi-Structured Interview with Mathematical Modeling Expert

We expanded our research to WPI professors to develop a Post-Engagement Data Entry Form and investigate possible mediums for showcasing analytics in the future.

We had the pleasure of meeting with Associate Professor Andrew C. Trapp of WPI. Dr. Trapp has professorships in Mathematical Sciences and Data Science and has published a series of data-focused research papers supported by the National Science Foundation. Given Dr. Trapp's expertise using science and technology to benefit vulnerable populations, we discussed ways of effectively showcasing the data Life Coaches collect.

## 3.2.3 Archival Research

To fill in the gaps left and explore new ideas introduced from our interviews with reentry experts, we conducted archival research on the databases and assessment tools that reentry organizations utilize with a focus on observational and quantifiable components that make up the qualitative indicators. Knowing that some indicators such as body language are missing in the reentry space, we also examined what is done in other disciplines.

### 3.3 Objective 3: Iteratively develop a plan to implement a new strategy for tracking successful reentry at Legendary Legacies

After analyzing the data collected at Legendary Legacies and examining established means of assessing qualitative data, we developed a Post-Engagement Data Entry Form for Life Coaches to gather relevant information with. We designed the PEDEF to not invade on the natural dialogue between the Life Coach and participant. In collaboration with Legendary Legacies, we presented recommendations to staff for initial feedback and made revisions.



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### 3.3.1 Post-Engagement Data Entry Form

The Post-Engagement Data Entry Form we developed helps Life Coaches evaluate their participant's progress along qualitative KPIs over time. The PEDEF is a three-page document utilizing a series of binary fields and Likert scales to measure a coach's observations following each engagement with a participant. The complete Post-Engagement Data Entry Form can be found in Appendix C.

### 3.3.2 Iterative Development

To ensure that the PEDEF exceeded Legendary Legacies' expectations, we routinely met with Mr. Ron Waddell, Executive Director, to present our work and get his feedback and address any comments and concerns that were raised. Finally, we met with the full staff at LL to present the then current PEDEF and make one last iteration according to the feedback generated.

### 3.4 Limitations

To expand our network with different reentry organizations, we initially planned on administering snowball sampling in our interviews with reentry experts. However, we could not effectively perform snowball sampling and decided to explore different avenues, such as directly contacting WPI professors.

# 4

## Findings & Analysis



Based on our in-depth analysis of interviews with stakeholders and archival research, we developed the following findings concerning qualitative data collection at reentry organizations. By exploring LL's existing data collection methods including the Ohio Risk Assessment System and the Munission Intake Form, we identified the qualitative KPIs evaluated least often. These findings laid the foundation for our final deliverables and became the center of focus for the rest of the project. The following chapter details the need for qualitative indicators, the interview analysis that uncovered key themes, existing tools utilized by reentry organizations, and the concerns that shaped our PEDEF.

## 4.1 There is a need for collecting qualitative data in the reentry space

According to Ron Waddell, the current quantitative data collection isn't indicative of any incremental changes and fails to speak to the impact of the program on its participants. In speaking with Life Coaches at Legendary Legacies, we saw a universal desire to collect data on qualitative KPIs that tell the complete story. Right now, Life Coaches record surface-level analytics for funders but don't know how to measure the qualitative data they believe is more indicative of the program's impact. We encountered similar findings during our discussions with Ms. Lili Elkins and Mr. Sako Long, of Roca and UTEC, respectively. Ms. Elkins and Mr. Long both explained that their data collection for qualitative data at their organizations is scarce. Coaches at Legendary Legacies, Roca, and UTEC witness qualitative indicators in their everyday engagements with participants but don't keep a formal record of such KPIs.





## 4.2 Life coaches value well-being, relationships, and accountability

During our semi-structured interviews, Life Coaches at Legendary Legacies described the qualitative indicators they look for in a participant during each engagement. We analyzed interview data to develop themes from the responses we heard. From the nine interviews we conducted with Life Coaches at Legendary Legacies and reentry experts, we derived 15 qualitative indicators that fall under the categories of Well-Being, Relationships, and Accountability, as seen in Figure 3.

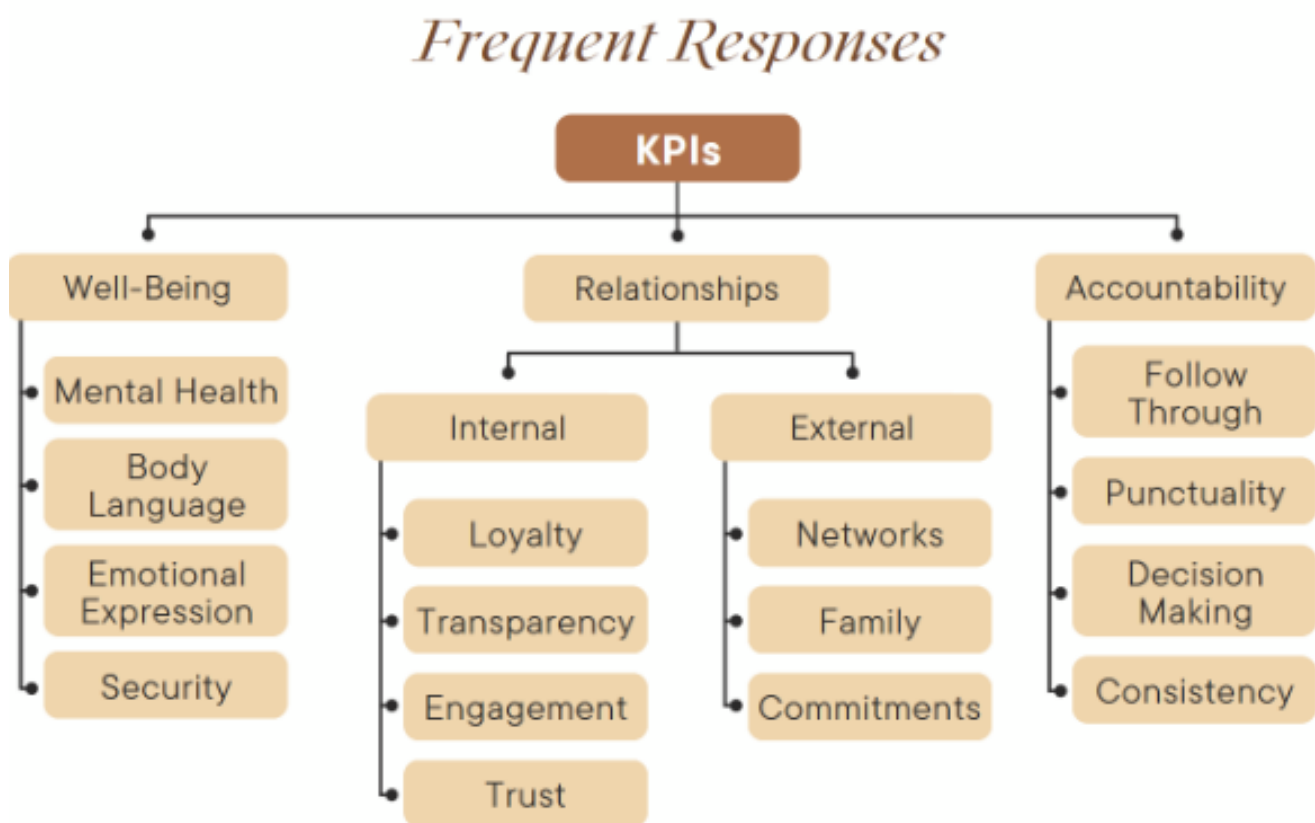


Figure 17: Frequent Responses from Life Coach Interviews



Figure 18: Matching KPIs with ORAS questions

### 4.3 The commonly utilized data collection methods look only at quantitative statistics

The anecdotal information gathered from semi-structured interviews suggests that the majority of data collection in the reentry space is purely quantitative. The gold standard of reentry assessment tools is the Ohio Risk Assessment System (ORAS), an exhaustive form that scores an individuals’ risk across 7 domains: (1) Criminal History, (2) Education, Employment, and Financial Situation, (3) Family and Social Support, (4) Neighborhood Problems, (5) Substance Use, (6) Peer Associations, and (7) Criminal Attitudes and Behavioral Patterns. Legendary Legacies, Roca, and UTEC all administer the ORAS to program participants every six months. Questions asked by the ORAS are largely binary and fail to account for the context that helps develop a deeper understanding of where a participants’ needs come from.

<b>1.0 CRIMINAL HISTORY:</b>		
1.1 Most Serious Arrest Under Age 18		<input type="text"/>
0=None		
1=Yes, Misdemeanor		
2=Yes, Felony		
1.2 Number of Prior Adult Felony Convictions		<input type="text"/>
0=None		
1=One or Two		
2=Three or More		
1.3 Prior Sentence as an Adult to a Jail or Secure Correctional Facility		<input type="text"/>
0=No		
1=Yes		
1.4 Received Official Misconduct while Incarcerated as an Adult		<input type="text"/>
0=No		
1=Yes		
1.5 Prior Sentence to Community Supervision as an Adult		<input type="text"/>
0=No		
1=Yes		
1.6 Community Supervision Ever Been Revoked for Technical Violation as an Adult		<input type="text"/>
0=No		
1=Yes		
<b>Total Score for Criminal History:</b>		<input type="text"/>

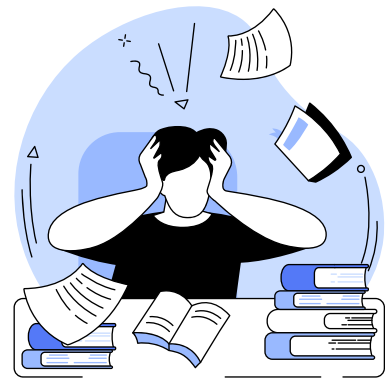
<b>2.0 EDUCATION, EMPLOYMENT, AND FINANCIAL SITUATION:</b>		
2.1 Highest Education		<input type="text"/>
0= High School Graduate or Higher		
1= Less than High School or GED		
2.2 Ever Suspended or Expelled From School		<input type="text"/>
0=No		
1=Yes		
2.3 Employed at the Time of Arrest		<input type="text"/>
0= Yes		
1= No		
2.4 Currently Employed/School		<input type="text"/>
0=Yes, Full-time, Disabled, or Retired		
1=Not Employed or Employed Part-time		
2.5 Better Use of Time		<input type="text"/>
0=No, Most Time Structured		
1=Yes, Lots of Free Time		
2.6 Current Financial Situation		<input type="text"/>
0=Stable/Minimal problems		
1=Problems		
<b>Total Score for Education, Employment, Financial:</b>		<input type="text"/>

Figure 19:  
Preview of Ohio Risk Assessment System: Community Supervision Tool

## 4.4 Heavily assessing program participants is not desirable for anyone involved

From their first encounter with the criminal justice system and throughout the reentry phase, participants undergo a high volume of assessments from corrections and parole officers. Legendary Legacies understands that participants are already over-assessed and instead develop close relationships to support participants.

Based on anecdotal evidence gathered during semi-structured interviews, the ORAS is an exhaustive data collection tool that takes roughly 40 minutes to complete and is administered to participants every six months. Each Life Coach at Legendary Legacies works with an average of 8 participants with several advising more than 10 at any given time. Implementing even just a ten minute post-engagement assessment to fill in the gaps left from the biyearly assessment would add over 2 hours of extra work to a Life Coach's week.



## 4.5 Transparent, noninvasive assessments can promote a desire for growth in participants

From our interview with Mr. Long, we learned that UTEC's coaches implement weekly reflection plans with participants. Personalized plans allow participants to set goals for themselves and reflect on what needs to be done to achieve such goals week over week. Reentry experts all agree that the only person capable of making lasting change is oneself. Being transparent with a participant about expectations that they have set for themselves is the best way to encourage prosocial behavior.

# 5

## Recommendations



Considering our findings, we have developed three recommendations that Legendary Legacies can implement to increase program efficiency and foster data-informed decision-making.



## 5.1 Utilize Post-Engagement Data Entry Form to track qualitative KPIs

The fields in our PEDEF gauge a participant’s success over a range of qualitative indicators. After hearing feedback from LL’s Life Coaches, we created PEDEF by taking the most favorable aspects of the ORAS and condensing the assessment to be completed by a Life Coach after each interaction they have with their participant. The Post-Engagement Data Entry Form is not meant to replace the ORAS, but rather to be a supplemental observational assessment frequently recording qualitative data.

To streamline the data entry process, the PEDEF is split into two sections. The first page addresses punctuality, trust, and body language. The Life Coaches are expected to complete the fields on this page after every engagement they have with participants. The fields on the remaining pages cover mental health, emotional expression, security, transparency, engagement, networks, and decision-making themes that might not always come up in conversation but should be recorded when applicable.

 **WPI** **Data Entry Form Recommendations** 

Questions are grouped by theme. First page is designed to be completed following every interaction a Life Coach has, the pages after may be completed when applicable

**Punctuality:**

Did the participant initiate the engagement?  
 Yes  
 No

Did the participant show up?  
 Yes, on time  
 Yes, late  
 No, did not show up

If yes, why?  
Click or tap here to enter text.

**Trust:**

Did the participant reveal something new during this engagement?  
 Yes  
 No

Was the participant willing to open about his personal life?  
 Yes  
 No

If yes, what?  
Click or tap here to enter text.

Figure 20: Data Entry Form

We recommend that Legendary Legacies implement our PEDEF in their proprietary database. The PEDEF is largely composed of fields adapted from those found in the ORAS so it should feel familiar to reentry professionals while being straightforward enough to train any new Life Coaches at Legendary Legacies. Recording specific and intentional information fosters uniformity in the notes different Life Coaches take following each engagement. The Post-Engagement Data Entry Form lays out everything that Life Coaches need to record qualitative data and simplifies training new Life Coaches joining LL in the future.

**Transparency:**

**Has the participant revealed anything new from their previous involvement with the law?**  
 Yes  
 No

**If yes, what?**  
[Click or tap here to enter text.](#)

---

**Engagement:**

**Has the participant engaged in any programs since your last interaction?**  
 Yes  
 No

**If yes, what?**  
[Click or tap here to enter text.](#)

---

**Networks:**

**Does the participant engage in activities with family and friends?**  
 Yes  
 No

**If yes, what?**  
[Click or tap here to enter text.](#)

---

**How many close friends does the participant have?**  
[Click or tap here to enter a number.](#)

---

**How satisfied is the participant with the support he has received from his family or close friends?**

Not Satisfied		Somewhat Satisfied		Satisfied		Very Satisfied
1	2	3	4	5	6	7

Figure 21: Data Entry Form

## 5.2 Scales to interpret collected data

Recording data provides no benefit without also being able to assess changes in qualitative indicators over time. To address this problem, we recommend that Legendary Legacies use the scales we have provided to quantify where a participant is at in meeting their goal. The Post-Engagement Data Entry Form utilizes a combination of Likert scales and binary fields with open response options when applicable. Some items that the Post-Engagement Data Entry Form asks coaches to input can be complex and difficult to give concrete value to, especially to the Life Coach's interpretation. To account for this, Likert scales are used to record perceptions, opinions, and behaviors.

The Post-Engagement Data Entry Form records fields including "Is the participant in control of events in their life?" and "How satisfied is the participant with the support he has received from his family or close friends?" on a 7-point scale ranging from Never to Always and Not Satisfied to Very Satisfied, respectively. The size of this scale allows for a broad range of responses and best reflects growth over time. The "Rate the participant's perceived mood" field is on a 4-point scale with labels ranging from Distraught to Overjoyed. Having an even number of response categories forces Life Coaches to choose whether the participant's mood is more positive or negative and eliminates possible misinterpretation of a midpoint.

Fields such as "Did the participant show up?" or "Did the participant reveal something new during this engagement?" use Yes or No checkboxes to record binary information. However, we recognize that context is important, so the former question splits the Yes response into "Yes, on time" and "Yes, late" while the latter is followed by the open response "If yes, what?" This added context provides depth to the question and can help show growth where normal binary data fails to.



## Body Language:

Rate the participant's perceived body language.

Passive – Slumped posture, shows signs of discomfort such as biting nails, fidgeting, no eye contact, looking down, speaks quietly

Assertive – Interaction felt natural. Open, relaxed, pleasant, sits upright and comfortably, able to make eye contact, speaks clearly and with confidence

Aggressive – Overly stiff posture, arms crossed, moody, sulking, clenched jaw, direct stare, or staring off/bored, loud, demanding, urgent, arrogant, or sarcastic, clenched fists, pointing

Passive		Assertive		Aggressive
1	2	3	4	5

## Mental Health:

Is the participant in control of events in their life?

Never		Sometimes		Always		
1	2	3	4	5	6	7

Does the participant avoid conflict?

Walks away from a fight		Tries to avoid it but it seems to find him		First one in
1	2	3	4	5

## Emotional Expression:

Rate the participant's perceived mood.

Distraught		Upset		Happy		Overjoyed
1		2		3		4

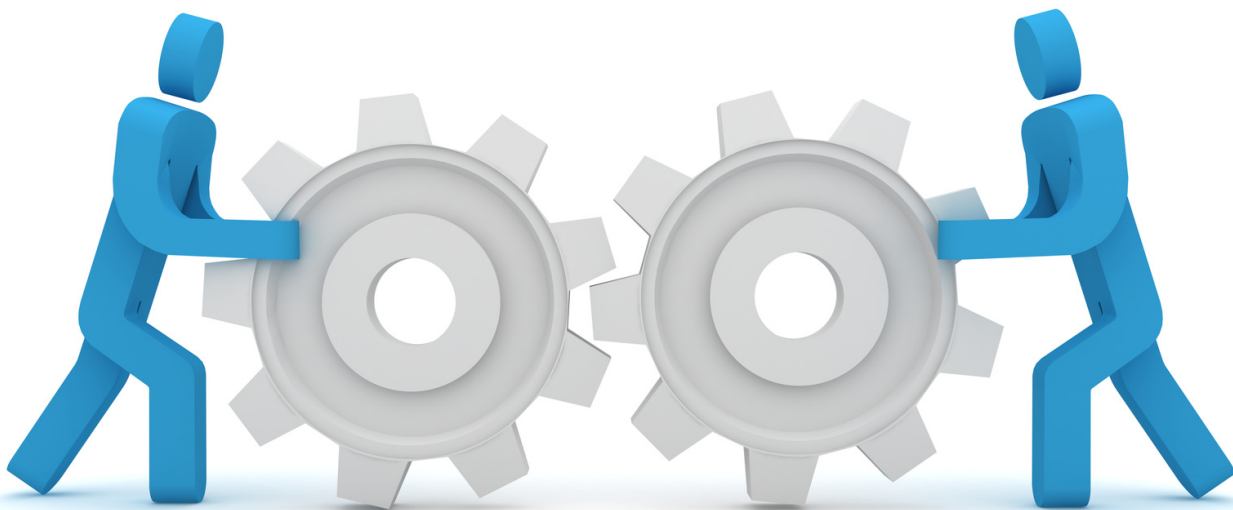
Does the participant worry about other people's problems?

Never		Sometimes		Always		
1	2	3	4	5	6	7

Figure 22: Data Entry Form

## 5.3 Future project in collaboration with WPI

There is still a large potential for growth at Legendary Legacies. This project is the first stepping stone on the long journey to change the way “success” is thought about and assessed for individuals post-incarceration. Throughout the project, we have discovered several potential opportunities for a future project, including a comprehensive dashboard to visualize the data that the PEDEF records and an AI word processing software to interpret and categorize the Life Coaches’ case notes. We recommend that Legendary Legacies collaborates with WPI in a future IQP or MQP to pick up where our work has left off and continue investigating the link between qualitative indicators and success for men post-incarceration.



# 6

## Conclusion

Engraved on the Legendary Legacies logo is Proverbs 13:22: “A Good man leaves an inheritance to his children's children, but the wealth of the sinner is stored up for the righteous.” A man that does not live up to the principles of righteousness will yield ramifications in the future. Although, there always exists a path to righteousness and those who seek that journey will be blessed with value to pass into the future. During our project, we have determined that there are no shortcuts in the reentry phase. However, we also found that the current criminal justice system sets up individuals post-incarceration in a position for failure. Reentry organizations, such as Legendary Legacies, focus on rebuilding that path to righteousness for these participants.

Once again, we'd like to thank everyone that has helped in our project, from the entire Legendary Legacies staff to the professors and other reentry organizations.





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# Appendix A: Interview Procedure for Legendary Legacies' Life Coaches

## Oral Consent Form:

We are the Legendary Legacies team from Worcester Polytechnic Institute of Technology based in Worcester, Massachusetts. We are conducting interviews with Legendary Legacies' life coaches, sponsors and representatives from other reentry organizations to collect information about what kind of data they collect, how they collect it, and some methods they use to measure qualitative pillars of success. This research will be used to identify an effective method to track key performance indicators for men post-incarceration to determine what a successful reentry entails.

Your participation in this study is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous. No names or identifying information will appear on the questionnaires or in any of the project reports or publications. This is a collaborative project between Legendary Legacies and Worcester Polytechnic Institute and your participation is greatly appreciated. If interested, a copy of our results will be provided via email.

If you have any questions about our research, you can contact our team at [gr-ll\\_iqpteam\\_b22@wpi.edu](mailto:gr-ll_iqpteam_b22@wpi.edu). If you have any questions regarding your rights as a research subject, please contact Worcester Polytechnic Institute's Institutional Review Board at [irb@wpi.edu](mailto:irb@wpi.edu).

Thank you for your help!



Sample interview outline:

1. Ask to record for future transcripts
  2. Introduce ourselves
  3. Briefly explain the purpose of this interview
    - a. We're looking for KPIs that may be difficult to quantify or track on paper
- Hear some successful reentry stories
  - Oral consent
    - Participation is voluntary
    - You may withdraw at any time
    - Your responses will be anonymous. No names or identifying information will appear in any reports or publications
  - Tell us a little bit about yourself
    - Your background
    - Why LL
  - As a life coach, what do you do when sitting down with a participant?
    - How would you challenge a participant when they may be struggling with accomplishing agreed upon goals?
    - How would you identify certain potentials or qualities in your participants, positive traits?
    - What data do you collect either informally or formally?
      - How do you keep track of these things week to week?
      - When do you know someone's on a good track or if they've been hooked
    - What information do you gather for funders?
    - Is there anything that's missing from the picture that you think is important? (things that might be harder to put on paper)

## Appendix B: Interview Procedure for Reentry Organizations

Sample email sent to representatives:

Hello [CONTACT'S NAME],

We are undergraduate students from Worcester Polytechnic Institute (WPI), collaborating with Legendary Legacies, a Worcester-based reentry organization, to reevaluate the way success is thought about for individuals' post-incarceration.

We'd like to request an interview with a representative from [ORGANIZATION NAME] to ask a few questions about how you assess various KPIs. This interview is designed to be brief and should take no more than 30 minutes of your time and can be conducted via either Zoom or phone call. Below are some of the questions we may ask during the interview:

What do you believe a successful reentry looks like for participants in your program after the first week/month/etc.?

What factors do you see as most critical in predicting the success of individuals you work with?

Which indicators do you find most difficult to quantify or measure on paper?

How do you evaluate qualitative aspects with a participant, especially characteristics like healthy habits, trust, accountability, etc.?

We'd love to speak with you and are free to meet Monday-Friday from 10-5PM but can accommodate any time with advanced notice. If you have any concerns or questions about our research or to schedule a meeting time, please reply to this email or contact our team directly at [gr-ll\\_iqpteam\\_b22@wpi.edu](mailto:gr-ll_iqpteam_b22@wpi.edu). If interested, a copy of our results and findings can be provided via email upon the project's conclusion. We appreciate your time and effort in meeting with us!

Oral Consent Form:

We are the Legendary Legacies team from Worcester Polytechnic Institute of Technology based in Worcester, Massachusetts. We are conducting interviews with Legendary Legacies' life coaches, sponsors and representatives from other reentry organizations to collect information about what kind of data they collect, how they collect it, and some methods they use to measure qualitative pillars of success. This research will be used to identify an effective method to track key performance indicators for men post-incarceration to determine what a successful reentry entails.

Your participation in this study is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous. No names or identifying information will appear on the questionnaires or in any of the project reports or publications.

This is a collaborative project between Legendary Legacies and Worcester Polytechnic Institute and your participation is greatly appreciated. If interested, a copy of our results will be provided via email.

If you have any questions about our research, you can contact our team at [gr-ll\\_lqpteam\\_b22@wpi.edu](mailto:gr-ll_lqpteam_b22@wpi.edu). If you have any questions regarding your rights as a research subject, please contact Worcester Polytechnic Institute's Institutional Review Board at [irb@wpi.edu](mailto:irb@wpi.edu).

Thank you for your help!

Sample interview outline:

- Ask to record for future transcripts
- Introduce ourselves
- Assure the findings of our project can be viewed if asked.
- Briefly explain the purpose of this interview
  - We're looking for KPIs that may be difficult to quantify or track on paper
- Hear some successful reentry stories
- Oral consent
  - Participation is voluntary
  - You may withdraw at any time
  - Your responses will be anonymous. No names or identifying information will appear in any reports or publications
- How do you keep track of these qualitative KPIs such as accountability, well-being, and relationships with these participants?
- What do you believe a successful reentry looks like for participants in your program after the first week/month/etc.?
- What factors do you see as most critical in predicting the success of individuals you work with?
- Which indicators do you find most difficult to quantify or measure on paper?
- How do you evaluate qualitative aspects with a participant, especially characteristics like healthy habits, trust, accountability, etc.?
- Would you happen to know any representatives of other reentry organizations that we could potentially connect with in the future to better understand what we're looking for?

# Appendix C: Post-Engagement Data Entry Form



## **WPI Data Entry Form Recommendations**

Questions are grouped by theme. First page is designed to be completed following every interaction a Life Coach has, the pages after may be completed when applicable



### Punctuality:

Did the participant initiate the engagement?

- Yes
- No

Did the participant show up?

- Yes, on time
- Yes, late
- No, did not show up

If yes, why?

Click or tap here to enter text.

### Trust:

Did the participant reveal something new during this engagement?

- Yes
- No

Was the participant willing to open about his personal life?

- Yes
- No

If yes, what?

Click or tap here to enter text.

### Body Language:

Rate the participant's perceived body language.

Passive – Slumped posture, shows signs of discomfort such as biting nails, fidgeting, no eye contact, looking down, speaks quietly

Assertive – Interaction felt natural. Open, relaxed, pleasant, sits upright and comfortably, able to make eye contact, speaks clearly and with confidence

Aggressive – Overly stiff posture, arms crossed, moody, sulking, clenched jaw, direct stare, or staring off/bored, loud, demanding, urgent, arrogant, or sarcastic, clenched fists, pointing

Passive		Assertive		Aggressive
1	2	3	4	5

### Technique:

What CBT skill(s) did you utilize in this interaction?

Click or tap here to enter text.

### Case Notes:

What else about the engagement did you want to note?

Click or tap here to enter text.

## Mental Health:

Is the participant in control of events in their life?

Never	Sometimes				Always	
1	2	3	4	5	6	7

Does the participant avoid conflict?

Walks away from a fight	Tries to avoid it but it seems to find him		First one in	
1	2	3	4	5

## Emotional Expression:

Rate the participant's perceived mood.

Distraught	Upset	Happy	Overjoyed
1	2	3	4

Does the participant worry about other people's problems?

Never	Sometimes				Always	
1	2	3	4	5	6	7

## Security:

Has there been a new arrest or violation since your last engagement?

- Yes  
 No

If yes, what?

Click or tap here to enter text.

## Transparency:

Has the participant revealed anything new from their previous involvement with the law?

- Yes  
 No

If yes, what?

Click or tap here to enter text.

## Engagement:

Has the participant engaged in any programs since your last interaction?

- Yes  
 No

If yes, what?

Click or tap here to enter text.

## Networks:

Does the participant engage in activities with family and friends?

- Yes  
 No

If yes, what?

Click or tap here to enter text.

How many close friends does the participant have?

Click or tap here to enter a number.

How satisfied is the participant with the support he has received from his family or close friends?

Not Satisfied		Somewhat Satisfied		Satisfied		Very Satisfied
1	2	3	4	5	6	7

## Decision Making:

Has the participant made any big decisions since the last engagement?

- Yes  
 No

If yes, what?

Click or tap here to enter text.

Does the participant consider potential implications when making decisions?

- Yes  
 No

