Overview of Performance Measurement
Using Performance Measurement in Program Management: Self-Assessment for Program/Project Directors

Special Note

This skill building activity can be used to apply the concepts and principles covered in this module to real world situations.

This self-assessment encourages grantees to consider how they might make use of performance measurement throughout the year. It was developed for program and project directors. Another version is available for AmeriCorps State and National Grantees.

Introduction

Performance measurement is the process of collecting data in a systematic way to answer questions about performance. Directors can use performance measurement to plan for and manage programs throughout the year. Performance measurement is more than a check-off for an annual report; it is an integral part of the program development, implementation, and assessment.

The self-assessment on pages 3-7 can help directors consider ways of utilizing performance measurement to improve program management. Following the assessment, on page 8, are some suggestions. After completing the assessment, directors may want to talk with staff and develop a plan to incorporate performance measurement to improve the intervention, efficiency of operations, and inform decision making.

Key Points

- Performance measurement can and should be used for program management throughout the program year (e.g. during program planning and implementation, assessment and program improvement, and building sustainability).
- During program implementation, performance measurement can be used for making decisions about allocating resources for training needs and sites.
- Evidence of success (outcome data) can be used to recruit beneficiaries and community volunteers, solicit input from the community, and raise awareness about the organization's mission and services.
- For making decisions about program improvement, data can be analyzed in different ways to determine how to modify or expand the intervention to better serve beneficiaries.
- For building sustainability, results can be shared with stakeholders and used in marketing materials to show how the intervention is meeting local needs.

Sticking Points and Common Issues

Below are some possible barriers to using performance measurement throughout the program year.

We don't have the expertise.
You don't need to be a statistician. Often simple summary results, such as frequencies, can provide valuable input to a decision-making process or a report. Summary results from prior years can also give you information over a period of time for comparison. Simply reading through survey comments can help you get a sense of how people feel about the intervention, for example, and the kinds of issues/concerns you might need to be aware of.

We don't have the time to look closely at our performance measurement data.
Performance measurement should be integral to program management. It should, ultimately, help you use your time and resources more efficiently. Consider, with your stakeholders, how best to use the performance measurement data you are already collecting to help you make decisions.

Regardless of what the data tell us, we are limited in what we can change.
Carefully consider where you might have creative opportunities to apply some leverage. Data can provide evidence for what should be changed, and help you make the case for additional support or policy changes to stakeholders and funders. Data can contribute to your understanding of what is working well and where to allocate scarce resources. In the meantime, you are still compiling a record/history for future decisions.

We can't spend the time developing new reports for stakeholders.
Incorporate performance measurement results into the reports and marketing materials you already use. This can be as simple as a short article in a newsletter highlighting results. The goal is to spread the word: "This is how we know we are making a difference." Use the opportunity to thank supporters and make the case for continued support.

Using PM in Program Management (Self-Assessment)

Consider how well you/your staff use performance measurement planning, process, or results during each of these times over the program year. If "great" or "okay", jot down an example. If it "needs work" or you don't use performance measurement, consider how you might use it during this time. (Some situations may not be applicable to your situation.)

Program Development and Implementation

Program/activity planning (e.g. clarify why intervention is needed, develop outcomes that are aligned with need and theory of change)

How well do we use performance measurement for this?

__ Great	__ Okay	__ Needs Work	__ Don't do
Example of how we use it:		*How can we make better use of it?*	

Recruiting service beneficiaries (e.g. determine who, within beneficiary population, is most likely to receive the greatest benefit)

How well do we use performance measurement for this?

__ Great	__ Okay	__ Needs Work	__ Don't do
Example of how we use it:		*How can we make better use of it?*	

Recruiting community volunteers (e.g. consider volunteer traits and experience that would be most helpful in achieving outcomes)

How well do we use performance measurement for this?

__ Great	__ Okay	__ Needs Work	__ Don't do
Example of how we use it:		*How can we make better use of it?*	

Training staff, National Service participants, and community volunteers (e.g. use results to open discussion about how training could better support program outcomes)			
How well do we use performance measurement for this?			
__ Great	__ Okay	__ Needs Work	__ Don't do
Example of how we use it:		*How can we make better use of it?*	

Working with sites (e.g. clarify National Service participants' roles in the service activities; reiterate data collection responsibilities)			
How well do we use performance measurement for this?			
__ Great	__ Okay	__ Needs Work	__ Don't do
Example of how we use it:		*How can we make better use of it?*	

Community outreach (e.g. celebrate success; use results in marketing materials to demonstrate how community support has helped the program meet needs)			
How well do we use performance measurement for this?			
__ Great	__ Okay	__ Needs Work	__ Don't do
Example of how we use it:		*How can we make better use of it?*	

Assessment and Improvement

Improving the intervention (e.g. compare data to determine amount of service –frequency, intensity, and duration – that achieves outcomes for different beneficiaries)

How well do we use performance measurement for this?

__ *Great*	__ *Okay*	__ *Needs Work*	__ *Don't do*
Example of how we use it:		*How can we make better use of it?*	

Improving outcomes (e.g. determine if targets can be more challenging or outcomes can address community need more directly)

How well do we use performance measurement for this?

__ *Great*	__ *Okay*	__ *Needs Work*	__ *Don't do*
Example of how we use it:		*How can we make better use of it?*	

Expanding services (e.g. gather feedback from stakeholders to determine what services are still needed)

How well do we use performance measurement for this?

__ *Great*	__ *Okay*	__ *Needs Work*	__ *Don't do*
Example of how we use it:		*How can we make better use of it?*	

Improving instruments and data collection process (e.g. review data to determine where instruments or data collection process may be biased)

How well do we use performance measurement for this?

__ *Great*	__ *Okay*	__ *Needs Work*	__ *Don't do*
Example of how we use it:		*How can we make better use of it?*	

Sustainability

Identifying partners and developing new partnerships (e.g. clarify shared goals, perspective on community need, and expected outcomes)

How well do we use performance measurement for this?

__ *Great*	__ *Okay*	__ *Needs Work*	__ *Don't do*
Example of how we use it:		*How can we make better use of it?*	

Resource development (e.g. provide evidence to prospective donors and funders about how the intervention accomplishes results)

How well do we use performance measurement for this?

__ *Great*	__ *Okay*	__ *Needs Work*	__ *Don't do*
Example of how we use it:		*How can we make better use of it?*	

Informing and involving stakeholders (e.g. share results, discuss expectations of the intervention and outcomes)			
How well do we use performance measurement for this?			
__ *Great*	__ *Okay*	__ *Needs Work*	__ *Don't do*
Example of how we use it:		*How can we make better use of it?*	

Reporting to funders (e.g. provide evidence of results to meet accountability requirements)			
How well do we use performance measurement for this?			
__ *Great*	__ *Okay*	__ *Needs Work*	__ *Don't do*
Example of how we use it:		*How can we make better use of it?*	

Next Steps

Jot down notes on any next steps you plan to take (e.g. have a conversation with staff about …; call state program specialist to ask about …)

Points to Consider

FOLLOW-UP DISCUSSION

Below are some ideas for how performance measurement might be utilized over the program year. All of the suggestions will not be applicable to every situation.

Program Development and Implementation
Review performance measures with staff, sites, National Service participants, and community volunteers to reinforce the importance of implementing the activity with fidelity. This may include a discussion of:
- the program's theory of change;
- targets and timeline for expected outputs and outcomes;
- the intended target population and how they will be referred to the program; and
- the expected level of service beneficiaries should receive.

Other things to discuss during program planning and implementation:
- Intervening issues or changing conditions that might hinder program success; what can and cannot be controlled
- Training and support of service providers
- Data collection schedule and training for data collectors
- Ideas for how results might be shared with stakeholders

Assessment and Improvement
Periodically review results, assessment instruments and data collection processes with key stakeholders.
- Are the instruments still relevant and useful (i.e. collecting valid data that addresses expected outputs and outcomes), or do they need revision?
- Are the data collection processes as efficient and rigorous (e.g. consistent, complete) as they could be?

Review and "pull apart" the data to help you determine where improvements could be made to the intervention.
- "Dosage": Look at data from beneficiaries who have received different levels of service, including combinations of different services and intensity and duration of service. Do different levels of service produce consistently different outcomes? Is there a "saturation point" where more service does not mean more improvement?
- Population characteristics: Look at data from beneficiaries with different characteristics (e.g. levels of education or external support) – factors that you think could be affecting outcomes. How can the intervention be modified to better assist those who are not achieving the expected outcomes?
- Site/community characteristics: Compare data from beneficiaries at different service locations. Are there differences in site resources or service provider training levels that affect outcomes? Can inputs be modified to assist those sites that are not achieving expected outcomes?

Sustainability

Your data may suggest that parts of the intervention could be improved to the point where significantly stronger outcomes could be accomplished, or significantly more beneficiaries experience those outcomes, if additional resources were obtained.

- Use performance measurement results to make a convincing case to prospective funders, donors, and community volunteers: "*Our results show that with __# volunteers, we can accomplish __ for __# people.*"
- Your results may show that some sites consistently achieve stronger outcomes than others. Is there something unique about these sites or your partnership with them? Can you duplicate that success with other sites, or at new sites?

Possible Venues for Brainstorming or Sharing Ideas

- Part of regular staff meeting agendas (topic discussion changes depending on the program year emphasis)
- Board and/or staff retreats, planning meetings
- Colleague meetings/conferences (e.g. share results indicating best program practices, practices in measuring performance)
- Participant and site training (e.g. share results and ideas for improving program elements and/or data collection processes)
- Proposals/fundraising events (share results and "next steps" for program or performance measurement improvement
- Recognition events for community volunteers (celebrate success)