Performance Measurement 201:
Best practices in performance measure design and implementation
Performance Measurement Overview

• Ongoing, systematic process of tracking your program or project outputs and outcomes

• **Outputs**: Amount of service provided (people served, products created, or programs developed)

• **Outcomes**: Changes or benefits that occur
  – Can reflect changes in individuals, organizations, communities, or the environment
  – Typically include changes in **knowledge, attitudes, behavior, or condition**
  – Must have a logical connection to the intervention and be aligned with outputs
Purpose of Performance Measurement

- **Recognition of progress**
  - Collect reliable information about the intervention’s implementation and progress toward outcomes

- **Accountability to funders and stakeholders**
  - Communicate achievements in a meaningful and compelling way

- **Program improvement**
  - Spot and correct problems
  - Strengthen the intervention
  - Determine where to allocate limited resources
How CNCS Uses Performance Measures

• Tell the story of the collective impact of national service programs

• National Performance Measures:
  – Reflect CNCS Strategic Plan and programming priorities
  – Allow for consistent terms, definitions, and approaches to measurement (“speaking the same language”)
  – Priority Measures: used across multiple CNCS programs
  – Complementary Measures: customized for particular programs (e.g., AmeriCorps)

• Applicant-determined Measures*:
  – Intended for programs whose interventions, outputs, or outcomes do not fit under existing National Performance Measures

*Some National Performance Measures have applicant-determined outcomes
Best Practices: Performance Measure Design

- Select PMs that fit your program design and theory of change, not vice versa
- Less = more: focus on a small number of high-quality measures
- Measure outputs and outcomes for program beneficiaries*
- Clearly define all terms used
- For longer-term outcomes, set targets that are achievable in a single grant year

*Except for member development and teacher corps measures
Best Practices: Performance Measure Design (continued)

• Use numerical targets, not percentages
• For outcomes that require participant follow-up, set targets that take into account response rate attrition
• Clearly distinguish outcomes from outputs while maintaining logical alignment
• Choose outcome measures that are ambitious but realistic; ensure that the program can realistically document or track the required information.
Best Practices: Performance Measure Implementation and Data Collection

• Set up MOUs with service sites that clearly lay out data collection responsibilities/expectations
• Provide up-front training in data collection for members, site supervisors, and other program staff
• Obtain baseline data so that changes can be objectively assessed, rather than assessing perceptions of change retroactively
• Select data collection instruments that are valid (measure what they are supposed to measure) and reliable (yield consistent results)
• Keep data collection procedures consistent over time and across different sites
Best Practices: Performance Measure Implementation and Data Collection (cont.)

- Choose data collection instruments that are accessible and yield timely data
- Develop creative ways to improve beneficiary responses to data collection efforts (incentives, etc.)
- Allocate sufficient resources toward data collection efforts: money, time, personnel
- Build in time for data review and verification prior to compiling/submitting reports
- Incorporate data quality review protocols into monitoring visits to sites
- Share best practices between programs/commissions
Successful Strategies from the Field

Performance Measurement is an Evolutionary Process

Planning Grant → Formula Grant → Competitive Grant
<table>
<thead>
<tr>
<th></th>
<th>Planning Grant</th>
<th>Formula Grant</th>
<th>Competitive Grant</th>
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</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>Model PMs (set targets)</td>
<td>Applicant-defined PMs or National PMs</td>
<td>At least 1 National PM; others if needed</td>
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<tr>
<td><strong>Training</strong></td>
<td>Intro to PMs</td>
<td>PM 101</td>
<td>PM 201</td>
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<td></td>
<td>• Basics of PMs (what, why)</td>
<td>• PMs as management tool</td>
<td>• Refining tracking and reporting systems</td>
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<td></td>
<td>• Using PM Module</td>
<td>• Developing tracking and reporting systems</td>
<td>• Requirements for National PMs</td>
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<tr>
<td><strong>Monitoring</strong></td>
<td>Focus = timing and progress</td>
<td>Ensure tools and systems are in place and being implemented</td>
<td>+ Ensure required tools and systems are in place and being implemented</td>
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<tr>
<td><strong>Feedback</strong></td>
<td></td>
<td>• Accuracy of targets</td>
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<td>• Effectiveness of tracking and reporting systems</td>
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<td>• Implications for program design</td>
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Successful Strategies from the Field

• Developing and/or clarifying PMs
  – Engage stakeholders early and often
  – Use feedback and data to set reasonable targets
  – Model and pilot-test approaches
  – Get help from a professional!

• Collecting PM data
  – Don’t reinvent the wheel
  – Know requirements and limitations and be flexible when appropriate
  – Be accessible
Successful Strategies from the Field

• Providing T&TA to applicants and/or subgrantees regarding performance measurement and data collection
  – Engage peers as trainers
  – Connect those who get it with those who don’t yet

• Monitoring subgrantees/operating sites for successful PM implementation and data collection
  – Set milestones and review at regular intervals
  – Keep the big picture front and center
Activity: Exploring Sample Performance Measures

- Review the assigned performance measure (different tables will be asked to review different measures).
- At your tables, discuss what aspect(s) of the performance measure could be improved, and propose specific changes to address the identified issues.
- Be ready to share your recommendations with the larger group.
Additional Resources

• AmeriCorps Performance Measures: www.nationalserviceresources.gov/npm/ac

• Performance Measurement Core Curriculum: www.nationalserviceresources.gov/npm/training-resources
  – Performance Measurement Basics
  – Theory of Change
  – Evidence
  – Quality Performance Measures
  – Data Collection and Instruments