

Performance Measurement 201:

Best practices in performance measure design and implementation



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2014 AmeriCorps *State and National Symposium*



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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

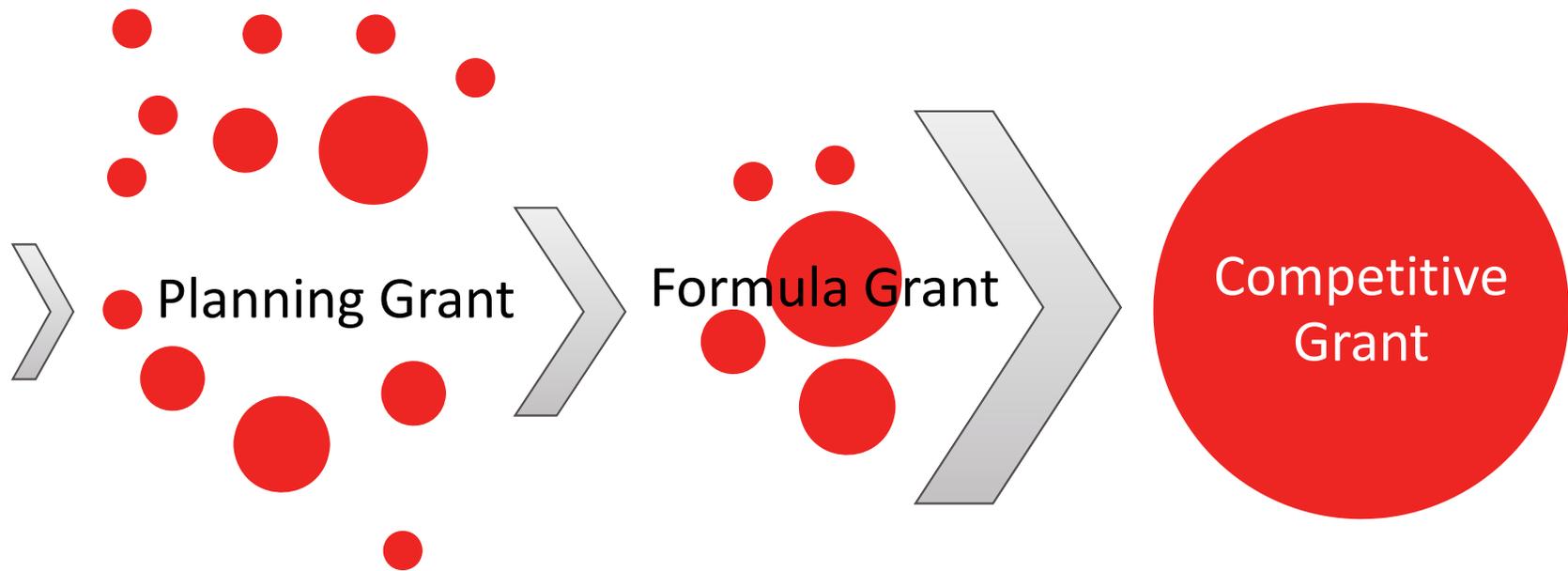
Best Practices: Performance Measure Implementation and Data Collection (cont.)

- 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
Type	Model PMs (set targets)	Applicant-defined PMs or National PMs	At least 1 National PM; others if needed
Training	Intro to PMs <ul style="list-style-type: none"> Basics of PMs (what, why) Using PM Module 	PM 101 <ul style="list-style-type: none"> PMs as management tool Developing tracking and reporting systems 	PM 201 <ul style="list-style-type: none"> Refining tracking and reporting systems Requirements for National PMs
Monitoring	Focus = timing and progress	Ensure tools and systems are in place and being implemented	+ Ensure required tools and systems are in place and being implemented
Feedback		<ul style="list-style-type: none"> Accuracy of targets Effectiveness of tracking and reporting systems Implications for program design 	

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



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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



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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**