# Performance Measurement Institute

## Application and Performance Measures Exercise

**Part 1: Narrative section.**

Individuals: *Review the PM Checklist and then read the narrative section of the application. Use the PM Checklist to identify which key PM components are present and which are missing or need further clarification. Note questions for clarification you might ask the program.*

1. After reading the narrative, what would you guess is the program's set of aligned performance measures? Write it down (You can be brief! "Members will ____ [intervention] in order to serve _____ [output] and improve____ [outcome]")

Small group. *Discuss your PM checklist responses, so far…*

2. For which of the checklist items, if any, do group members differ in their ratings? What are the issues? How closely do you agree on what the program's set of aligned performance measures?

3. What clarification questions would you ask the program?

**Part 2: Performance Measures.**

<u>Individuals</u>: *Read the performance measure(s) in the application. Revisit the PM Checklist and note what is present and what is missing. Add or modify clarification questions to ask the program.*

<u>Small group</u>. *Discuss your PM checklist responses and questions.*

1. Are there differences of opinion about how the group members rated PM Checklist items? What are the issues?

2. How did reviewing the performance measures change the ratings?

3. What clarification questions would you ask the program?

*Consider the review process:*

4. What was challenging about this application review?

5. What worked well during this application review process?

6. What is one effective practice you currently use or plan to use during the application review process (particularly for the PMs)?

7. What ideas do you have on how you will support staff/reviewers in reviewing the PMs?

**Facilitator Notes for Large Group Debrief on Reviewing the Veterans application using the PM Checklist** (Key points)

**Inter-rater reliability**
- The small group work allows participants to grapple with definitions and note differences and similarities in using the ratings as they go through the review process. If you are training reviewers for the application review, use this as an opportunity to explore where there were differences in understanding the meaning of key terms (definitions).
- Note that consensus of the group (coming to common understanding and agreement) so as to achieve consistency in ratings is the goal as you work toward a reliable review process.

**Is everything there? Does it hang together in a logical and cohesive fashion? Where are the gaps and issues?**
- The checklist identifies key PM elements that may be present or absent from the application, whether those elements are aligned with one another and the quality of those elements. It should become apparent to the participants that when the foundation is weak (i.e. unclear outcome) it becomes difficult to assess the related items (target, instrument, etc.).

**Checklist: Importance of questions for clarification**
More important than the rating itself is to help the group identify questions for clarification for the sample program.
- #1 Intervention aligns with need: What is the evidence that the service to veterans will connect them to services and meet the need? Where does this information come from? (Any recommendations about where the program might look for this evidence?)
- #6/#13 Output/outcome target value is reasonable. Can 80 part-time members work with 15,000 veterans to connect them to services? What is the "dosage" of service per Veteran? Can 80 part-time members achieve success outcomes for 11,250 veterans?
- #9 Clear outcome and indicator: While the outcome statement can be general, the indicator needs to be concrete and specific. For the Veterans application (as noted above), it is unclear what "successfully participate or complete services" really means. What does "successful participation/completion" look like in practice? How is the program ensuring that this result addresses actual change (outcome) and not just participation (output)? What changes in Veterans' knowledge, skills, attitude, behavior or condition will result from referring them to various services?
- #15 Instrument rigor: How does the "X Reporting tools" capture the outcome? Who is collecting the information? How? What about the Veteran Re-Integration Questionnaire (mentioned in narrative)? Does this provide baseline information about Veteran? Can the program measure change using it?

**Checklist: Common understanding of checklist items**
Discuss any questions on checklist items, what can be reasonably determined from application and note documents that provide clarification or definitions (e.g. Considerations document, in house documents to be used). For instance:

- #6/#13 "Targets are logical and target values **appear reasonable**"
  - The target should serve as a benchmark for how much change the program believes will indicate success. Review whether the number reasonable given the service dosage (frequency, intensity). An output target value of 500 kids receiving tutoring does not appear reasonable if the intervention is 1-on-1 tutoring and there are only 5 members doing the tutoring.
  - In the case of the Veteran program, the number of Veterans served would mean that each part-time member served approx. 188. In the outcome target, 11,250 are to show some kind of change - "successful completion". Does this appear reasonable?

- #7/#15 "Instruments are **sufficiently rigorous**"
  - At a minimum the instrument name has been identified
  - The data source appears appropriate
  - The instrument has been used before or tested
  - The questions/tracking items assess the outcome (or output)
  - In the case of the Veterans application, it is not apparent that *X* Reporting System is able to measure the outcome. More information would be helpful.

- "Data Collection methodologies are **appropriate**"
  - There should be evidence of a data collection plan or at a minimum some indication of who will be collecting the data from whom, how often and using what protocols
  - Data collectors (Members) will be or have been trained
  - Privacy/confidentially issues are addressed