Performance Measurement Manual for FY 2007

MULTNOMAH COUNTY, OREGON
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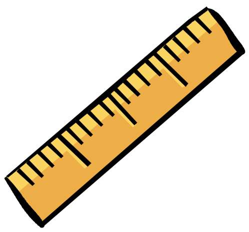
Introduction

Introduction



Performance Measurement is the process of developing and using meaningful, objective indicators that can be systematically tracked to assess progress made in achieving predetermined goals. The process requires ongoing data collection to determine if a program is implementing activities and achieving objectives. It typically measures resources used, activities performed, and results over time. The data are used to identify the difference between what customers and stakeholders expect and what programs deliver.

The development of sound performance measures is a critical component of the priority-based budget process. Departments provide performance indicators as a part of their program offers. The Board uses the information to aid in their decisions to purchase programs. Purchase decisions are based on how well the program contributes to the priority—the County's long-term strategies—and what these programs promise to deliver.

Although progress has been made in integrating performance measures into program offers, the last Budget Process Survey and other feedback mechanisms found that the program offers' performance measurement information did not meet respondents' expectations. Many program offers included only output measures and others were reported without targets. Further, some programs simply repeated the same number in multiple offers.

Embarking upon an initiative to substantially improve the program offer performance measurement system will require a high level of commitment and effort for employees at all levels in the county. Included herein are detailed instructions, examples, templates, and additional resources to improve upon the performance measurement section of program offers.

History of Performance Measurement

A Brief History of Performance Measurement in Multnomah County

To best understand how performance measurement will occur in program offers, it is helpful to know what's already been done. The concept of performance measurement is not new to Multnomah County. Its importance has ebbed and flowed for the past 30 years. Below is a brief timeline of accomplishments in performance measurement in Multnomah County:

In 1973, the Multnomah County Office of Planning, Evaluation, and Program Development created the Program Objectives Productivity System (POPS) producing a catalog which detailed the personnel, financial, and activities for the county's 134 programs. The system explained activities but did not explain program outcomes or link them to greater strategic goals.

The 1990's saw substantial growth in using performance measurement in the County with board Resolution 90-45, which developed an implementation plan for county-wide program evaluation. From this point, performance measurement grew to include the fundamental strategies of formal program evaluation.

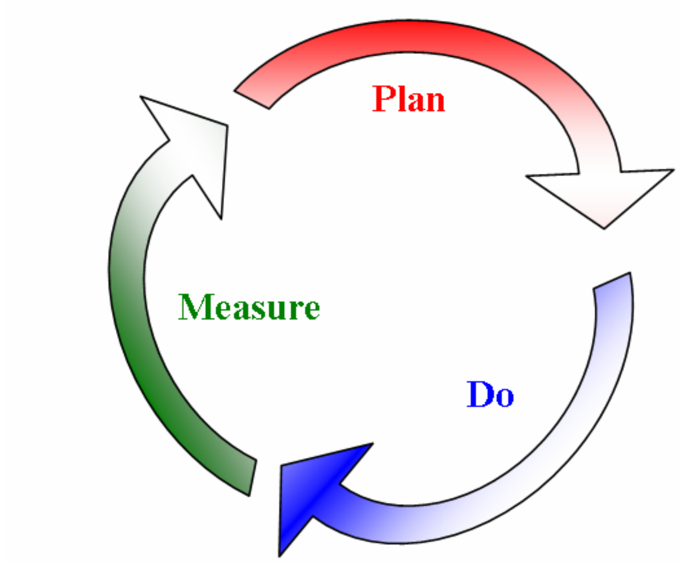
In 1993, Program Performance Budgeting introduced *Key Results* reporting. Key Results was the requirement that each program have at least one reportable measure, preferably some form of outcome. The data were published annually in the adopted budget document.

From this effort grew a more comprehensive 1996 quality initiative—termed RESULTS—which matched annual performance measurement (Key Results), formal program evaluation, and continuous process improvement teams.

The initiative linked program performance with the identification of intermediate and long-term strategies know as *benchmarks*. While this was the County's first comprehensive data-driven decision making system, the process failed to integrate performance measurement data into the strategic planning and formal budgeting process. This was because the process failed to operate on the Plan, Do, Measure cycle, but instead performance measurement and reporting occurred after the formal budget construction, deliberation, and adoption.

History of Performance Measurement

The Plan, Do, Measure Cycle



In 2000, the Auditor's Office began its *Service Efforts and Accomplishments (SEA)* reporting effort. This was designed to meet anticipated Government Accounting Standards Board (GASB) reporting requirements which provided more complete information about a government's performance beyond the traditional financial statements. The report alternates publishing years between public safety and health and human services, reporting to the public useful data including outcomes on various services that Multnomah County delivers. While increasingly useful to illustrate the County's accomplishments, its timeliness of the information is less useful as program management data or during the actual budgeting process.

In 2003, performance measurement added real-time reporting with the introduction of the Safety Priority Brief. This was a monthly real-time systems report detailing the workloads at various key decision points in the criminal justice system. The report was designed to meet a lack of timely and on-going workload data delivered in an easy to understand format. This was followed in 2005 with the Basic Needs Priority Brief. However, these reports were never designed to examine program outcomes.

History of Performance Measurement

Priority Based Budgeting—Budget for Results

Each of the previous efforts listed above moved Multnomah County closer to a system of timely, integrated results-based performance measurement within a planning and budgeting process. Lessons from each of these accomplishments were incorporated into the performance measurement system of the new priority-based budgeting process.

The new priority-based budgeting process relies heavily on the program offer in determining the relative contribution a program makes in achieving the County's Priorities. The program offer contains a program's description, financial and budget data, staffing, and a variety of performance indicators. The program offers are electronically submitted via the web-tool and posted on-line for review at mid-year. Outcome Teams from each priority area will review the program offers, meet with department staff and discuss issues, and provide feedback to the departments. This feedback should be incorporated in the revised offer to better clarify and strengthen the program offer.

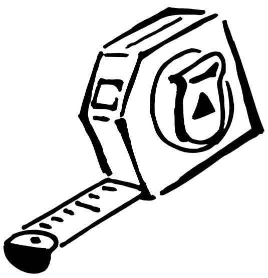
The New Process

The new process does the following:

- Integrates performance reporting during the planning stages of the department's program offer development
- Requires that all program offers provide a variety of meaningful performance measures
- Provides outcome measures that show a link to the marquee indicators
- Provides performance data at mid-year, allowing for timely course correction and future planning
- Includes a formal review process of the performance measures by the respective Outcome Teams, before ranking.

Why Measure Performance?

Why Measure Performance?



Performance measures are important for a number of reasons, but overall they relate to accountability, whether it is to the Board, manager, staff or otherwise. Programs are being purchased with the taxpayers' money, and the county has a responsibility to show the value in achieving results. Below are several specific reasons why performance measures are important:

● **Performance measures link to marquee indicators**. Marquee indicators are those high-level community measures specifically selected to reflect movement toward citizen-identified priorities. The County's FY 2006 strategy maps contain 20 measures, roughly three for each priority area. The program offer measures developed by departments should attempt to align with the marquee indicators as directly as possible. For example, one of the marquee indicators for the Safety Priority is "Percentage of adults and juveniles convicted of a crime who commit additional crimes (i.e. recidivism rates)." Measures for an offender job placement program that illustrate outcomes which reduce recidivism would be considered superior to measures that simply show how many offenders got jobs (an output).

● **Performance measures help decision-makers refine strategies and improve results.** The use of performance measurement information helps in developing priority based budgets and in setting overall performance goals for the county government. This is done through the allocation and prioritization of resources and by informing decision makers so they can either confirm or change current policy direction to meet those goals.

● **Performance measures help build community support for County programs.** Citizens are primarily interested in results or outcomes. An implicit aspect of results oriented budget process is "justification" which is where performance measures provide a strong empirical and factual basis for programs and services that clearly deliver strong and measurable results. Without strong performance, especially outcome measures, programs run the risk of more intense public scrutiny and losing support from citizens and communities. Besides, clearly specified performance measures can stimulate the public to take a greater interest in and provide more encouragement for government employees to provide quality services. They also help improve civic discourse and foster trust and public understanding of specific government service.

● **Performance measures help managers deliver expected results.** Having performance measures will increase attention to program results and customer satisfaction. Managers often use performance measure to help identify problem and promising areas and track results over time. Applying performance measures to all programs will also foster greater understanding, responsibility and accountability on the part of program managers since they are the ones who are responsible for attaining the program's performance targets. Without that accountability, the measures will do little to improve performance. On the other hand, measures can be a manager's tool to keep their focus and help achieve their desired results.

Why Measure Performance?

● **What gets measured gets managed; measures motivate!** The old adage that what gets measured get managed is most important in motivating staff. Most employees don't want to feel as though their program's performance is sub-standard and will rise to the challenge when presented with accurate performance information that shows opportunities for improvement.

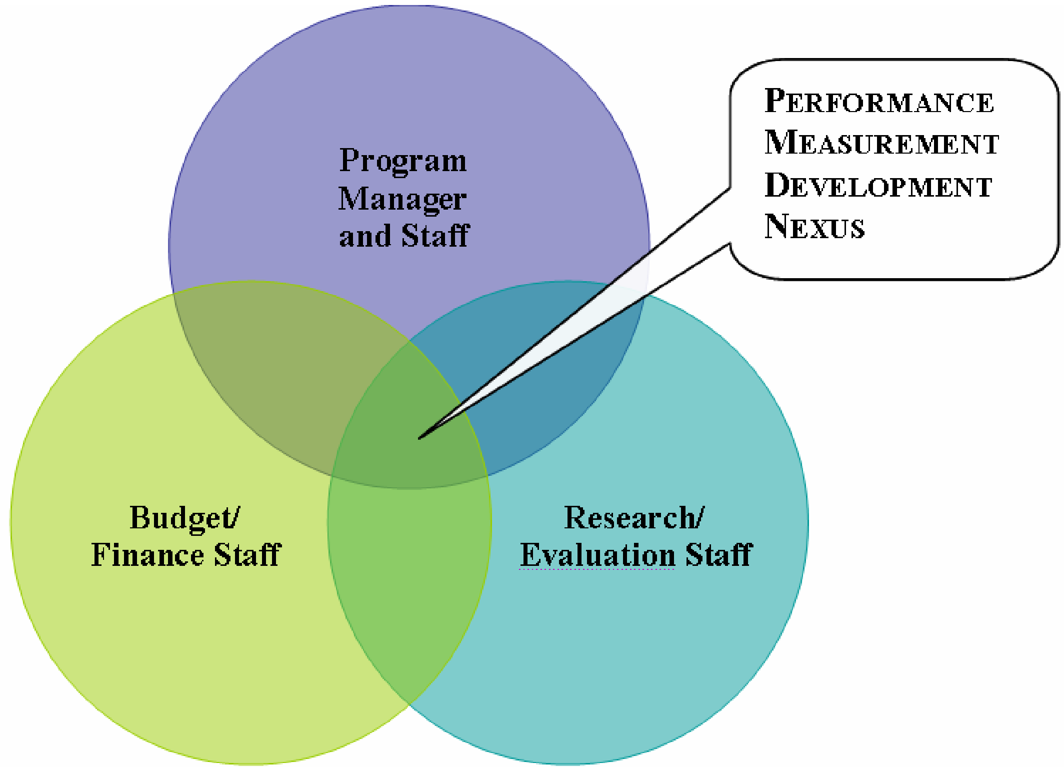
Getting Prepared

As part of the priority-based budgeting process, all program offers must include a variety of performance measures. This includes administrative and support program offers. To do this, the development of each program offer's performance measures must be coordinated with the program planning and offer submission.

Departments create their own program offers and are responsible for the accuracy of an offer's narrative, financial and performance information. Departments are also responsible for defining their programs' performance measures. Considering the wide range of services/programs delivered by the county (e.g., elections, animal control, jails, health clinics, libraries, etc.), the type and number of measures required to be submitted with program offers have been designed to give as much flexibility to the departments as possible, while still retaining the standardization needed for thoughtful review and year-to-year comparison.

A program offer's performance measures will benefit greatly when they are determined in conjunction with the program manager and staff, and the department's analytical staff. The program's manager and staff are important to include in the discussions about performance measures—they are the program experts. Their input and ultimate buy-in ensures that the data will be used. Analytical staff should include the department's experienced finance and budget staff, and any research or evaluation staff.

Measuring Performance: Developing Measures



Planning and cooperation are necessary for creating performance measures because a program's description (its activities and what it's trying to accomplish), budget determination (staff levels and funding needs) and service levels (inputs, outputs and outcomes, etc.) are highly interconnected. Expertise in each of these lies with various staff resources within the department. For example, a new program should define: the goals, delivery system and activities (managers and program staff expertise); the requested resources needed to accomplish the activities (budget and finance staff expertise); and the evaluation of program success (research and evaluation staff expertise). An established program might have a reduction in funding (e.g., grant loss), which in turn may reduce the service levels through lower volumes, longer processing times, or decreased customer satisfaction. This may ultimately lead to reengineering of the program. On the other hand, increased wait times or customer dissatisfaction may warrant increased funding needed to continue delivering services at the appropriate level. These interactions affect the variety and type of performance measures selected and their subsequent results.

Measuring Performance: Developing Measures

Which Measures Can We Report?

There are several types of performance indicators. Each of these draws upon a different aspect of the service that is being delivered. A good performance measurement system should include a variety of meaningful measures. These include input, output (workload), outcome (results), efficiency and quality indicators.

Input Indicators

Input (descriptive). This indicator is designed to report the amount of resources; financial, personnel, material, or other, that are available or have been used for a specific service or program. Financial and personnel data are the most common input measures. However, since they are already reported in the revenue/expense and FTE detail sections, they should not be repeated in the Program Performance Measurement section. Departments may choose to report other program resources that are managed or consumed. The measure is helpful in illustrating the scope of work, but not the actual activities performed. The data are typically reported as numbers and not percentages.

Examples of Input Indicators

- number of client referrals
- number of fleet vehicles
- number of jail beds
- number of branch hours opened
- number of maintained centerline/ lane miles
- number of helpdesk covered PC terminals
- number of prosecution cases received

Output Indicators

Output (workload). This is the most common type of indicator found in most performance measurement systems and reports the number units produced or services provided by the program. It describes the activities that a program has completed, but not necessarily their results. It is common for programs to have more than one output indicator. The data are typically reported as numbers and not percentages.

Examples of Output Indicators

- number of treatment episodes delivered
- number of vehicle repairs performed
- number of client screenings provided
- number of purchase orders issued
- number of vaccinations given to children
- number of centerline/ lane miles resurfaced

Outcome Indicators

Outcome (results). This indicator is designed to report the results of the service. It can often be described as an initial (e.g., successful treatment completion), intermediate term (e.g., success by 3 or 6 months), or long-term outcome (e.g., 1 year or more). There should be a logical connection from outputs to outcomes, with activities supporting the results in a sequential fashion. Whenever possible the outcome indicator should relate directly to one of the Priority's marquee indicators. The data can be reported as either numbers or percentages (assuming percentages of the output).

Examples of Outcome Indicators

- Percent reduction of juvenile recidivism
- Percentage of youth living independently at discharge
- Percentage of clients that reduced drug use at discharge (initial outcome)
- Percentage of clients drug-free at one year after discharge (long-term outcome)
- Reduction in disease

Efficiency Indicators

Efficiency (productivity). Efficiency measurement is a method for examining how effectively a program is performing the activities it is doing. This is an indicator that measures the cost of resources (e.g., in dollars, FTE, employee hours, time, etc.) per unit of output (e.g., per repair, per case, etc.).

Efficiency can also be qualified as a *productivity measures*. For example, where "vehicles repaired per labor hour" reflects efficiency, and "percentage of vehicles repaired properly" (e.g., not returned for rework within 6 months) reflects outcomes, "unit costs (or labor-hours) per proper vehicle repair" reflects productivity. The costs (or labor-hours) of faulty vehicle repairs as well as the costs of the proper repairs are included in the numerator of such a calculation, but only good repairs are counted in the denominator—thereby encouraging both efficiency and outcome by repair personnel.

Examples of Efficiency Indicators

- Cost per tax-lot appraisal
- Reports generated per analyst FTE
- Average number of days to close a case
- Cost per booking
- Labor-hours per proper vehicle repair

Quality Indicators

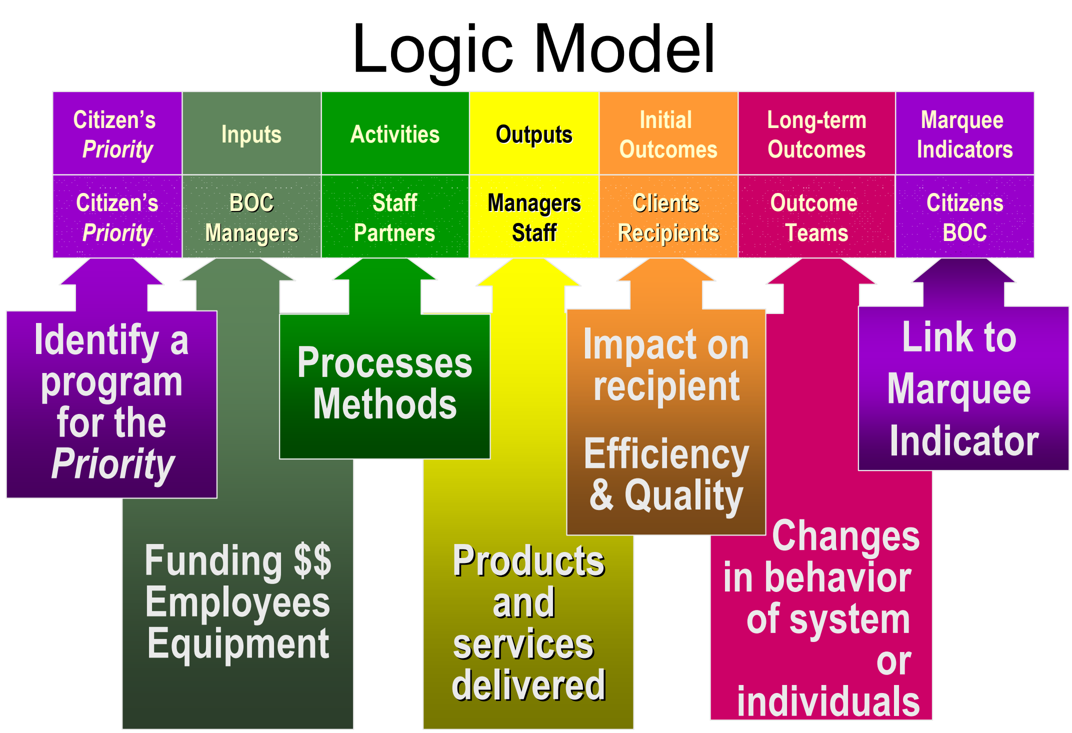
Quality. This measure reflects effectiveness in meeting the expectations of customers and stakeholders. Measures of quality include reliability, accuracy, courtesy, competence, responsiveness, and completeness associated with the product or service. Customer satisfaction reflects the degree to which the customer's expectations of a service are met or exceeded. Lack of quality can also be measured. Such examples include rework, correcting errors, or resolving complaints.

Examples of Quality Indicators

- Percent of reports that are error free
- Percentage accuracy of information entered in a data system
- Percent of customers that rank service as exceeding their expectation (customer satisfaction)
- Percent of clients waitlisted more than a month for treatment

Steps in Developing Program Measures

Developing meaningful performance measures depends on understanding the County's six priorities. Effective measures consider what the program is trying to accomplish; where the resources come from and how they are allocated; the program's main users, recipients, or clients; what activities are being performed; and what output and outcomes are expected. The following diagram shows a general program logic model for developing performance measures.



Adapted from: Mary Campbell 'Driving Changes and Getting Results'

Measuring Performance: Developing Measures

Measuring What Matters

It is important to measure what matters, not simply what i convenient. Jim Clemmer, a best selling author on performance management, once said: "Crude measures of the right things are better than precise measures of the wrong things."

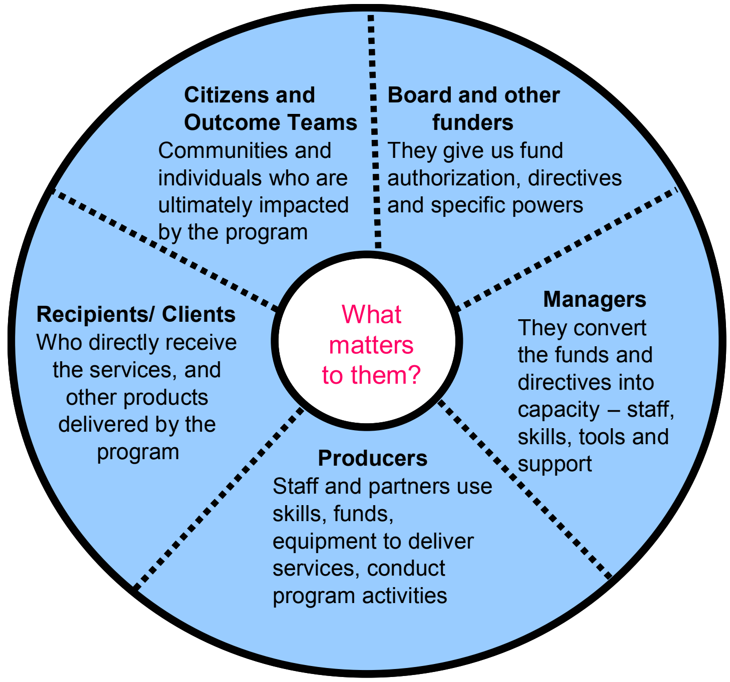
Thinking about what matters means considering what matters to whom. Some measures might matter to staff but not necessarily to the program's customers, the Outcome Teams that review and rank program offers, or the Board which ultimately purchases programs. In selecting performance measures, consider the following questions:

- Who are the customers or beneficiaries (internal and external) of your program?
- What are the significant performance measures valued by these customers or beneficiaries (e.g., outcomes, timeliness, effectiveness, quality, satisfaction, etc.)?
- What performance standards would our customers, clients, Outcome Team members, Board of Commissioners, department managers, grantors, etc., like to see us achieve on these measures?
- How might management and program staff explain what the program accomplishes in numbers to someone on the street?

The questions are about identifying who expects what results from the program/service offered and bringing their perspectives in the performance measure process.

As illustrated in the following chart, almost every program involves funders, managers and staff, service recipients, and the community in which the program operates. Their perspectives and expectations on performance should be brought into the process of building a program's performance measures. After identifying who matters, we can focus on what matters to them and create measures that are meaningful to them. With careful thought there is likely to be agreement on what matters from the various groups' perspectives.

Measuring Performance: Developing Measures



Adapted from: Mary Campbell 'Driving Changes and Getting Results'

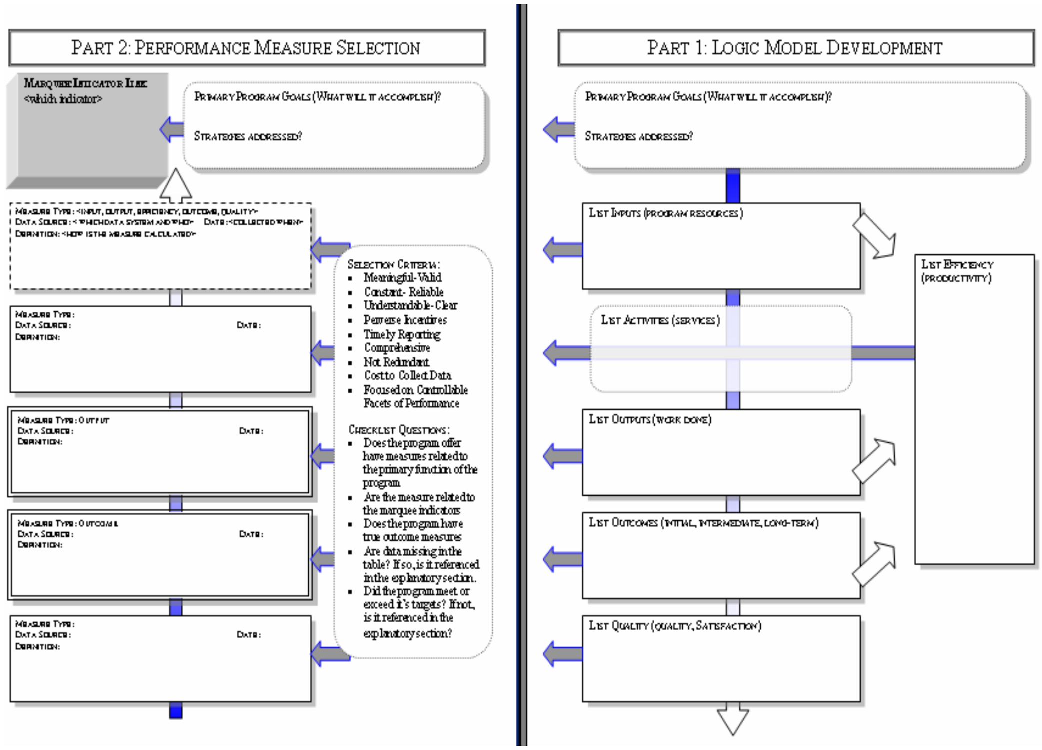
The Template

After identifying the specific priority to associate the program and considering the audience and what matters to whom, the next steps lie in determining the meaningful performance measures. Effective performance measures clearly identify relevant program resources, activities, outputs and outcomes. The easiest way to determine these is through program modeling.

A three-part modeling template is available in Appendix C. Part 1 develops the program logic model, Part 2 selects the performance measures and Part 3 details each of the measures. The template should be used to record information that is crucial to understanding how the measures were developed, how they were defined, and how data was collected. This information also helps with quality assurance, data analysis, and program offer evaluation.

Measuring Performance: Developing Measures

The Three-part Program Modeling Template



Future web-tools may allow for direct entry of this information, but until then the Budget Office Evaluation staff recommends keeping final copies on file. Be prepared! Copies of the templates may be requested by Outcome Teams for review with the related program offer. Board members may also request copies of these templates. Future plans include additional steps for independent quality assurance of data.

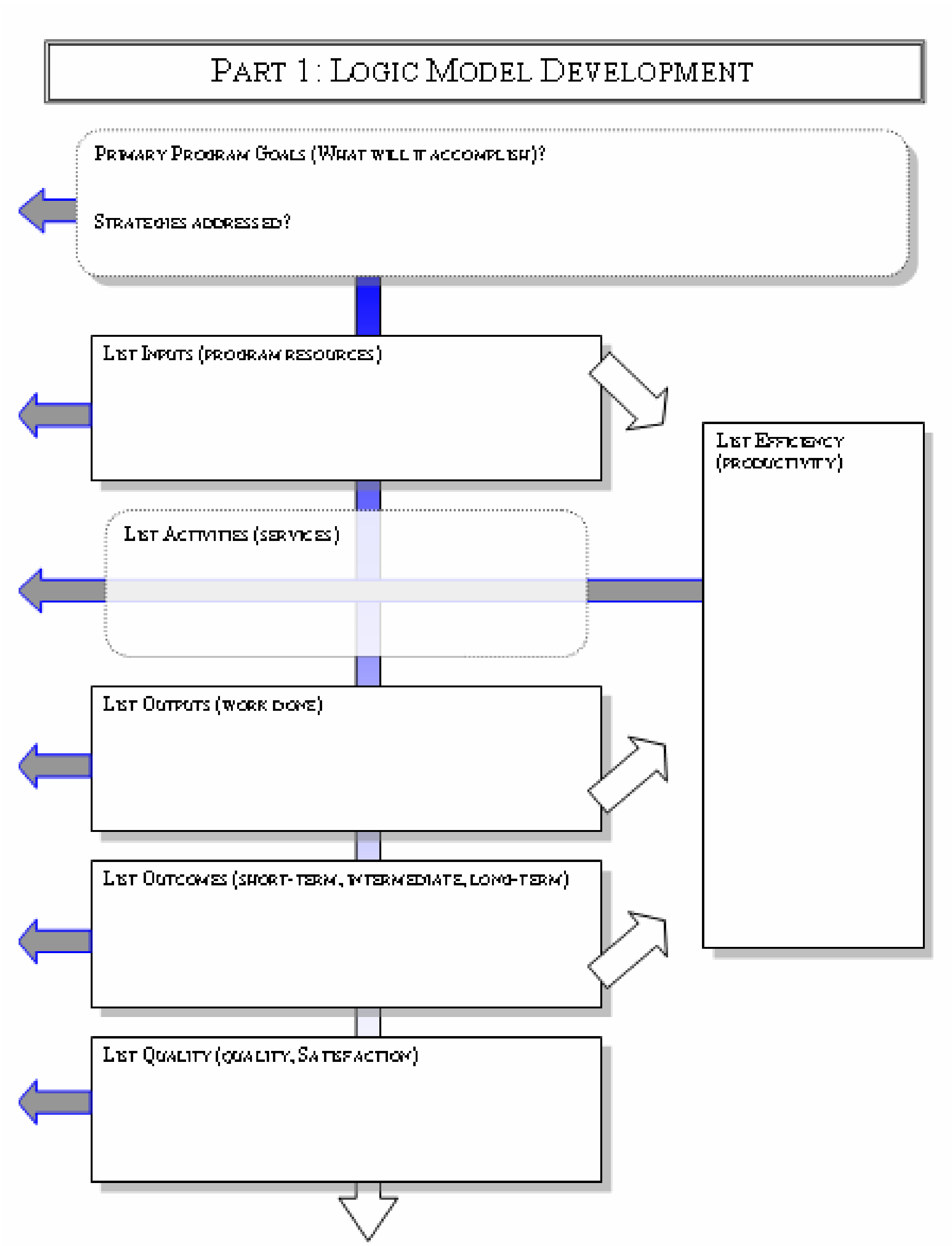
Part 1 is used to determine the basic program logic model and to brainstorm the variety and number of potentially meaningful measures. Each section may generate multiple measures. Some of these measures may already be collected by the department, while others may need to be developed. Here are some questions that should be considered as the template is filled out:

1. Think about how a program links to the County's Priority: what's the purpose and goal of the program? Where on the Priority Map might it fall? Which selection strategies is the program addressing?
2. List the program inputs: funding, FTE, materials (e.g., PC's, fleet vehicles, buildings, etc.), etc. needed.
3. Think about how the program works and how the service is delivered; briefly list the activities that lead to a product or service being delivered.
4. Identify program outputs; list what was accomplished.
5. Identify the initial outcomes of the program: both the outcomes expected shortly after the service is delivered and the intermediate or long-term outcomes you expect for the clients/customers who received service.
6. From the inputs, outputs, and outcomes consider efficiency indicators:

how much does it cost in staff or dollars? How long it takes (hours or days) to get an output or outcome? Are there are any efficiency mandates that need to be addressed?

7. Identify measures of service quality: is customer satisfaction measured? List any quality levels mandated.

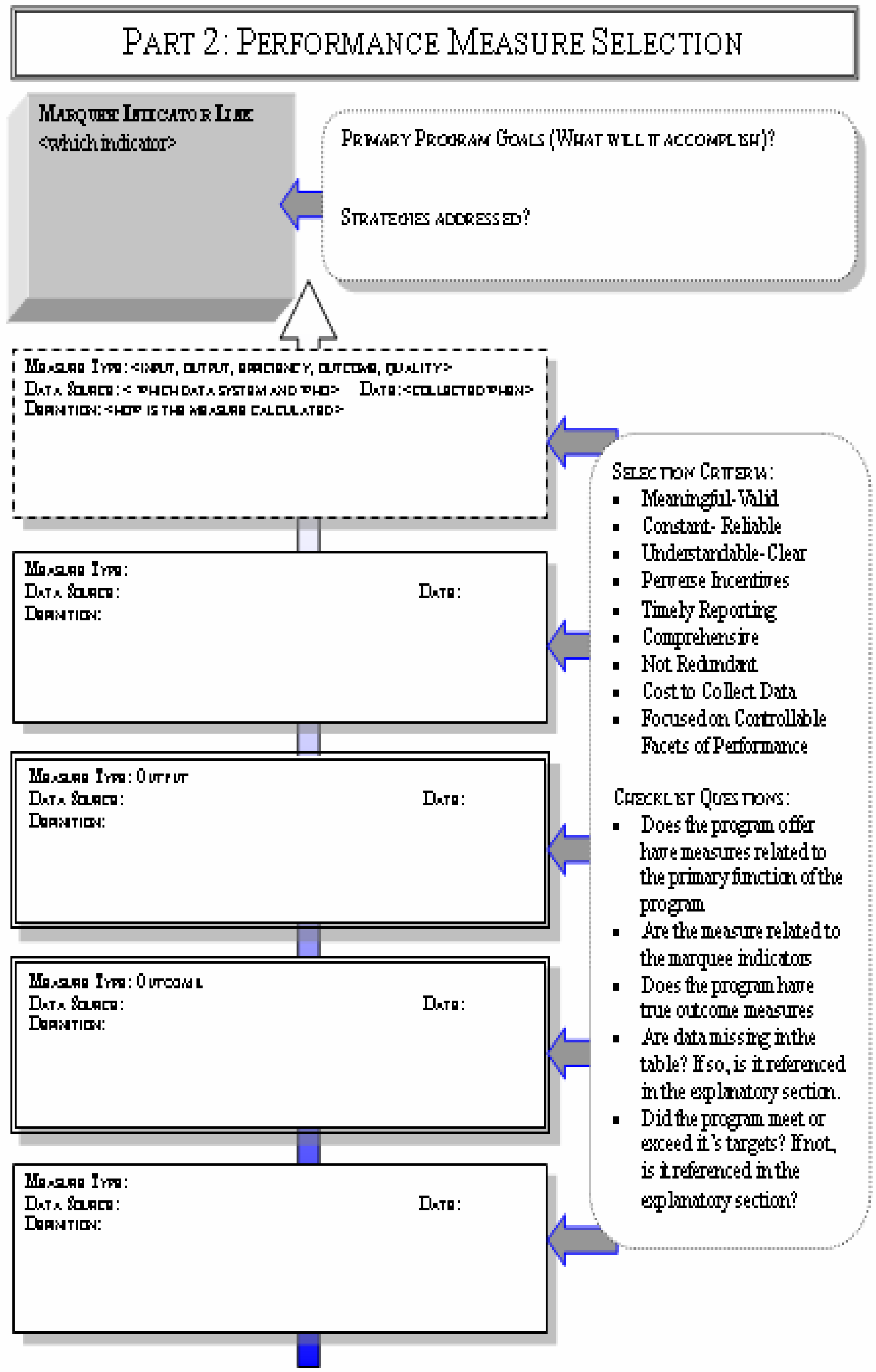
Part 1: Logic Model Template Sample



After completing Part 1, it is likely there will be more measures than needed for the program offer. Some will be less meaningful, some will be expensive to maintain, difficult to understand, or downright wrong given the context. Part 2 of the template—Performance Measure Selection—narrows the results of Part 1 by identifying the most meaningful performance measures to report.

Measuring Performance: Developing Measures

Part 2: Measure Selection Template Sample



Measuring Performance: Selection Criteria

Performance Measures Selection Criteria

Part 2 of the template includes a list of selection criteria to apply to each of the measures identified in Part 1. The selection criteria should be used to help narrow down the multiple measures and determine the most meaningful measure. A properly developed set of performance measures typically satisfy the following criteria:

- **Meaningful-Valid:** The key to assessing program performance is measuring the right things with the right measure. If a measurement fails to measure what was intended, then this measurement is not valid.
- **Consistent-Reliable:** The data used to generate the measurement must be consistently accurate and reliable. It is important that the collected data actually describe what is being measured. If other departments have similar services, can the same measure be applied universally (e.g., drug treatment services)?
- **Understandable-Clear**: Think about whether or not a measure is simple enough to be understood by people who are interested in the program. Keep it simple, and ask if it would pass the 'Aunt Edna' test.
- **Perverse Incentives:** Might the measure lead to behaviors that reduce quality or outcomes just so the "numbers look good"?
- **Timely Reporting:** Think about the appropriate time frame for which the data will be reported. The measurements used for developing annual budget must be provided by mid-year.
- **Comprehensive:** Performance measures should capture the most important aspects of a program's goals. When multiple measures exist, it's best to use a variety of measurement types (e.g., input, output, outcomes, efficiency, quality).
- **Not Redundant:** Due to the space limitation in program offers, there is room for only four measures—of which at least one is an output and one an outcome. It is acceptable to have more than one output or outcome measure, but keep in mind that providing variations on the same measure is redundant and a waste of space.
- **Sensitive to data collection cost:** For many programs, the data needed for performance measures are readily available. However, data collection cost should be taken into consideration, especially when creating new measurement. Data sharing across programs, divisions, and departments through data warehouses could dramatically reduce duplicated efforts in data collection. Many measures are already established and should be considered.
- **Focused on controllable facets of performance:** Good measures should focus on the indicators that show program success, individual behavior, or agency performance that can be directly affected by the activities of the program/service.

Measuring Performance: Selection Criteria

Once the measures have been selected, they should be clearly defined in the provided measurement boxes. Each box requires several pieces of specific information. Each measure should identify the type of measure (e.g., input, output, outcome, etc.), a clear definition, the source from which the data comes (including the contact person), and the date the data should be extracted. This allows consistency and reduces confusion in data collection.

The measure definition can be more technical than what might be printed in the limited program offer space. For example, the outcome measure definition may read: “the percent of residential drug treatment episodes where the engaged client completed a minimum of 2/3^{rds} of their treatment plan and tested drug-free 30 days prior to termination.” The program offer may state: “the percent of clients drug-free upon treatment completion.”

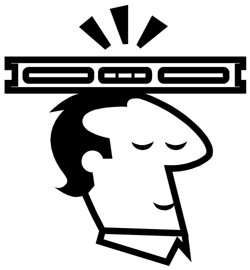
An additional template (Part 3: Performance Measure Detail) has been created for cases where greater specificity and documentation needs exist. For example, organizations that expect staff changes (i.e., expected retirements, promotions, etc.) or organizational structures that often change, may want to better document their measures for consistency and to reduced future confusion. Each measure determined in Part 2 can be detailed in a greater degree in Part 3. Part 3 should include the following information:

- Measure title or name,
- Description of what the measure provides,
- Unit of measure the result should be expressed in,
- Data requirements, or the specific data points/ variables needed for calculation,
- Data source; where the data come from, how often they are reported, and who is responsible
- Data calculation method or the specific criteria, filters and formula, and
- Data limitations

The Budget Office recommends keeping all templates on file by departments and submitting copies to the Budget Office Evaluation staff. This is optimal, but optional for FY 2007. Again, templates may likely be requested by Outcome Teams for review. Future plans include additional steps for independent quality assurance of data.

Measuring Performance: Tips & Suggestions

Tips and Suggestions



Initially, this process may appear overwhelming. Here are several tips and suggestions that can make the process easier, and help you to create a better program offer.

- Don't reinvent the wheel unless it's necessary. There are several places where measures are already being collected (Service Efforts and Accomplishments, Safety Priority Brief, Basic Needs Brief, Progress Board, Department Annual Reports, Grant Funding Reports, etc.)—in many cases these are good starting points for measures.
- Many programs have several activities that encompass the service. The measure should relate to the primary service or result that the program is attempting to accomplish. For example, a job placement program may measure the number of pre-service screenings, resumes created, or interviews scheduled, but the primary purpose is to place someone in a job and have that person remain employed. The last two measures—outputs and outcomes—are the measures of primary interest.
- It is likely that industry standard measures or comparable jurisdiction measures exist for many programs. If you're stuck, it can be helpful to search the internet for similar programs to determine what measures they use to report performance.
- There are cases where departments offer similar programs (e.g., drug treatment, call centers, protective services investigations, gang services, etc.). In these cases, the various program offers should attempt to use common measures where appropriate. This will move county reporting toward more standardized outcomes and increase the ease and understanding of performance measures by citizens.
- Use the best available measures. Crude measures of the right things are better than precise measures of the wrong things. Not all measures may be readily available, especially if the program is new.
- Better to have several measures than only the bare minimum. A variety of measures communicates the value of the program. This is especially true when outcome measures or data may not currently be available.
- Select measures that are effectible and meaningful. Measures that are always 100% suggest the bar is too low or the measure has little meaning from a program management perspective. This is also true of programs where failure is not an option. In these cases, proxy measures of what the program does may be better indicators of a program's performance.

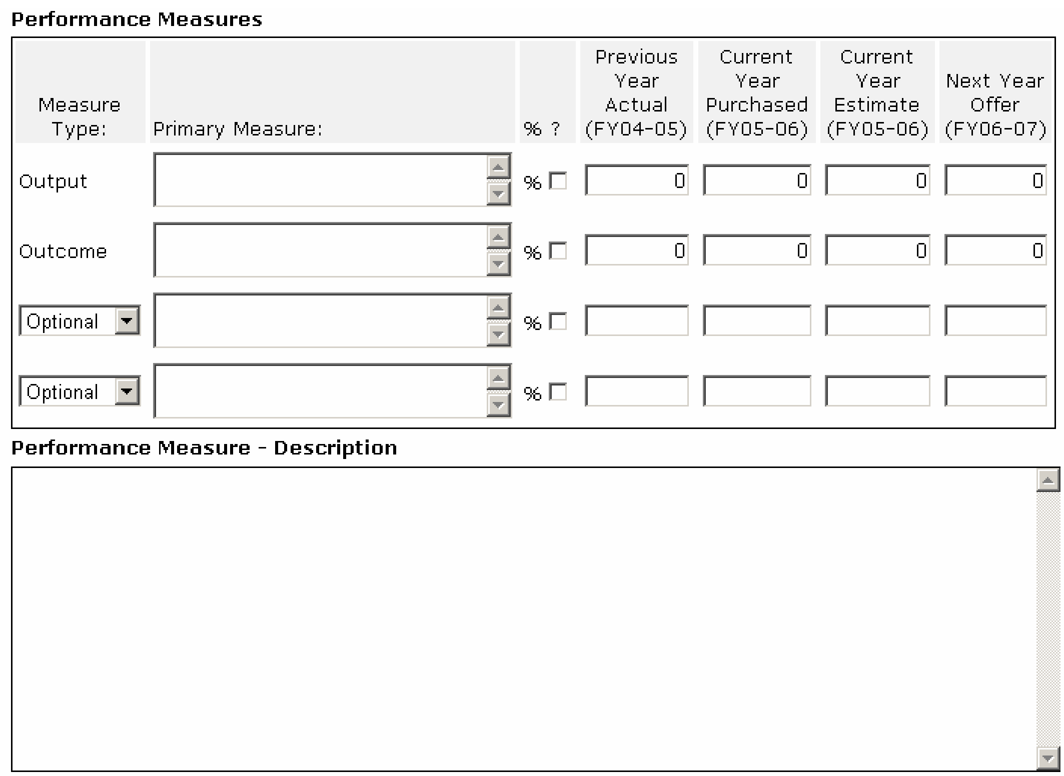
Data Entry & Submittal with Web Tool

Data Entry and Submittal through Web Tool

Once the performance measures have been determined and the template has been filled out, the data can be entered into a program offer via the web-tool. The FY 2007 budget web tool will include a Performance Measures section for each program offer. The section standardizes the performance measure data entry. This should make the data entry relatively easy, as well as simplifying future data retrieval. The web-tool has a two part section specifically for performance measures: 1) the quantitative table and 2) the qualitative explanatory section.

The quantitative table has space for four measures reporting the following data: the measure type, the measure definition, and cells for data for each year of performance and its numerical representations (i.e., number or percentage). Two of the measures are pre-determined as an output measure and an outcome measure. To offer the greatest amount of flexibility for the department, there are two additional slots.

Web-tool Interface



Performance Measures

Measure Type:	Primary Measure:	% ?	Previous Year Actual (FY04-05)	Current Year Purchased (FY05-06)	Current Year Estimate (FY05-06)	Next Year Offer (FY06-07)
Output		%	0	0	0	0
Outcome		%	0	0	0	0
Optional		%				
Optional		%				

Performance Measure - Description

Each measure includes data entry cells for the *Previous Year Actual* result, the *Current Year Purchased* target, the *Current Year Estimate*, and *Next Year Offer* (newly proposed target). They are ordered in a way to present historical results, current targets and performance estimates, and the program offer's target for next year. The cells allow the reader to easily make a variety of comparisons, including whether the program is meeting its specified targets. In addition, the data will be collected and trended over time.

The *Previous Year Actual* cells reflects the result of the last full fiscal year of service. In some cases (e.g., new program or new/revised measure) this data may not be available and can be left blank. In most cases, established programs should have historical data available for each measure.

The *Current Year Purchased* cell reflects the target service level for which the program is currently engaged. For example, if in last year's offer the program's target was to serve 250 clients, then the value in the *Current Year Purchased* should read 250. If your offer is an existing program, these values should be the same as last year's program offer target (i.e., Next Year Offer). Most measures should include these data, although there will be some cases (e.g., new programs or new measures) where this data may not be available and can be left blank.

The *Current Year Estimate* cell gives an annualized <u>estimate</u> based on the most recent program data. In most cases, programs will have 6 months of current fiscal year data, which should be adjusted for the full year. This adjustment is based upon program staff observations and the current year-to-date totals. This allows for comparison of current performance to the current year target. Additionally, this figure allows departments an opportunity to perform a mid-year review or course correction based on data.

The *Next Year Offer* cell reflects the service level target the department is proposing for the upcoming fiscal year should the program be purchased. This service level may not be the same as the previous year's service level, depending on service model or funding changes. For example, if a program's costs increase while revenue remained unchanged, the expected service level may decline unless increases in efficiency are found. Every program offer must include data for this indicator. This field should not be blank.

A qualitative explanatory section sits below the table and allows limited space to explain any issues with data anomalies, missing data, clarifications or changes to definitions, or other pertinent data-related issues. This is a place to briefly explain for example, why the program's current year estimate is half what the program offer was originally supposed to deliver. You may also note here whether a formal outcome evaluation has ever occurred for this program.

Scaled Offers

Special attention should be given to scaled offers. Each scalable offer's performance measures should report only those services that the scaled offer supports. For example, if the primary offer is for 10 residential beds, then the performance measure must reflect only those 10 beds. If the secondary scaled offer is for an additional 10 residential beds, then additional performance measures must reflect those additional 10 beds, and not the combined 20 beds. It would not be unusual for equally distributed offers to have similar performance measures (e.g., drug treatment days, successful drug treatment completion rates, etc.), especially if the data were from the same system.

Data Entry & Submittal with Web Tool

Entering the Performance Measures in the Web-tool

Below are the steps to fill out the web-tool:

1. Login to the web-tool and select the appropriate program offer.
2. To enter a new measure simply select the measurement type with the drop down box.
3. Enter the performance measure definition. This should be a simplified definition—technical language, acronyms and jargon should be avoided, if necessary include them on the template. Symbols like $, %, or # are perfectly acceptable.
4. Enter the data into each cell (Previous Actual Result, Last Year's Purchased Target, Current Estimate, and New Proposed Target)
5. Select the percentage check-box if the data in the cells should be reported as percentages
6. Repeat the steps for the additional measures.
7. Enter any clarifying information into qualitative explanatory section.

Checklist Questions

The cycle of performance measurement development is not over after the initial web tool submission. In response to their *Requests for Offers* (RFOs), the Outcome Teams will review the submitted program offer in detail, including their measures. Outcome Teams are an excellent source of feedback and assistance in helping departments develop better offers. Team members will have the opportunity to ask for clarification of the measures and may request copies of the templates used in selecting the measure. Among other methods, Outcome Teams will review each program's performance measures using following checklist of questions.

1. Does the program offer have measures related to the primary function of the program?
2. Are the measure related to the marquee indicators?
3. Does the program have true outcome measures?
4. Can the average reader understand what the program accomplishes numerically?
5. Are data missing in the table? If so, are reasons noted in the explanatory section?
6. Did the program meet or exceed its targets? If not, are reasons noted in the explanatory section?

Measuring Performance: Summarizing the Steps

Summarizing the Steps

The specific steps to submit performance measures in program offers are summarized below. Remember, Budget Office Evaluation staff will be available to provide assistance or answer questions as needed.

1. Gather the appropriate program managers and staff, budget and finance staff, research and evaluation staff from the department to review and discuss the program offer's characteristics.
2. Review the program offer description; understand the specific service the program is to deliver.
3. Fill out the program modeling template: identify what services will be delivered, who the primary customers/clients are, and list the program inputs, outputs, outcomes, efficiency, and quality measures
4. Use the Performance Measure Selection template to select the most meaningful measures; identify the measure type, its definition, the data source and contact person. Fill out the measurement detail if needed.
5. Remember to keep copies on file for next year and in case the Outcome Teams or others want to review them. It is optimal but optional to submit copies of the template to the Budget Evaluation Office in FY 2007.
6. Fill the performance measures section of the web tool for both the static output and outcome measures. For existing programs, all fields should be filled; some fields can be left blank if it is a new or substantially redesigned program or measure.
7. Use the optional measurement slots for the additional measures per department discretion.
8. Review the final program offer with the basic checklist questions; make any revisions as needed before final submittal.

The Challenges of Measuring Performance

Performance Measures Challenges

Some limits exist to what types of information performance measures can actually capture. Typically these are limits one sees in cases where direct measurement is difficult or costly. Often however, measurement difficulties are due to unclear program results. Clarifying the program results will go a long way towards developing meaningful measures. Below are several common responses when applying performance measures.

● **You can't measure what I do**. Areas previously thought to be "unmeasurable" such as prevention, education programs and even international relations have been shown to be measurable if someone is motivated and creative enough to pursue an innovative approach. Since so many jurisdictions have initiated performance measurement systems in recent years more information than ever exists for staff to reference (see Appendices for additional resources). In some cases even information may be limited to proxy measures or successive milestone measurement rather than traditional outcomes.

In some cases, the outcome of a program may not be realized for many years. In some cases, this can be addressed by identifying meaningful output-oriented milestones that will lead to achieving the long-term outcome goal. To address this issue, a program should define the specific initial and intermediate outcomes to accomplish the long-term outcome goal. These steps are likely to be output-oriented, prerequisite accomplishments on the path toward the outcome goal. It is important that these steps are meaningful to the program, measurable, and linked to the outcome goal.

● **The measures aren't fair because I don't have total control over the outcome or the impact.** It is the rare program that has total control over the outcome, but if programs can't demonstrate any impact on the result, then why should the program be funded?

Often programs from various departments all contribute to achieving the same goal. The contribution of any one program may be relatively small or large. One approach to this situation is to develop broad, yet measurable, outcomes shared by a collection of programs, while also having program-specific performance goals.

● **It will invite unfair comparisons.** Comparison is going to happen whether programs invite it or not. But the program offer doesn't stand only on it's performance results. Clearly articulating the program's target audience and services can help temper attempts at apples-to-oranges comparisons. Consider working with other programs of similar design to use the same measures.

Additionally, taking the initiative in selecting comparable organizations can help your program by proactively comparing performance, determining how well you are doing, and seeking ideas on how you can improve your performance.

● **Performance data will be used against the program.** Demonstrating transparency and accountability, even when the news is not so good, inspires trust, gives the program performance data street credibility, and shows that the department's understand their programs and the difficulty of providing social services. If programs are open about the need to improve, most people will give a program the benefit of the doubt as long as programs demonstrate improvement plans. Cynical manipulation of measures, for example selecting overly easy targets or ignoring relevant data, will likewise cause the Outcome Teams and other reviews to question motives and credibility and will lead to mistrust.

● **Priority-based budgeting is just a passing fad.** Based on the responses to the survey instrument, the high level of satisfaction with the new priority-based budgeting process appears to be anything but passing. Pressure to demonstrate program results, accountability and improvement is only expected to increase.

● **We don't have the data/we can't get the data.** Considering the investment the County has made in information technology, it is hard to believe that performance data are not available. If a program is important enough to fund, staff should be able to find some way to collect data on its effectiveness. It can be as simple as a desktop spreadsheet using information collected from a hard-copy log. What is important is that critical indicators of success are identified and measured consistently and conscientiously.

● **We don't have the staff resources to collect the data.** The reality is that administrative positions will not likely be added for performance measurement. Program managers should realize however that dedicating a small percent of their time to collecting data on thoughtful measures, and using the data to manage for results, will generally save more time than would be spent correcting problems down the road.

● **How do I measure prevention.** Programs with a deterrence or prevention focus can be difficult to measure for a variety of reasons. Most importantly, deterrence measurement requires consideration of what would happen in the absence of the program. Also, it is often difficult to isolate the impact of the individual program on behavior that may be affected by multiple other factors. If performance measures reflect a continuum from lower-level outputs to higher-level outcome measures related to the overall goal, it is important for deterrence programs to choose measures that are far enough along the continuum that they tie to the Priority and Marquee Indicators as well as to the program's activity. This will help ensure that the measures are both meaningful and genuinely affected by the program.

● **Programs where failure is not an option.** For programs where failure to prevent a negative outcome would be catastrophic such as programs to prevent terrorism or a pandemic disease outbreak, traditional outcome measurement might lead to an "all-or-nothing" goal. As long as the negative outcome is prevented, the program might be considered successful, regardless of the costs incurred in prevention or any close calls experienced. In these cases, proxy measures can be used to determine how well the deterrence process is functioning. These proxy measures should be closely tied to the outcome, and the program should be able to demonstrate how the proxies tie to the eventual outcome. Because of the risk, multiple proxy measures should be used. Failure in any one of the safeguards would be indicative of the risk of an overall failure.

● **Isn't this is just Key Results?** Priority-based budgeting is a completely different way to budget. The process is focused on timely and accurate data in program offers which are reviewed and ranked by Outcome Teams. Interviews with multiple county staff and reviews of independent analyses of performance measurement in Multnomah County determined several reasons why Key Results fell into disuse. The new system and process has been designed avoid these pitfalls.

1. The Key Results data were never integrated in the strategic planning and budget process; data came after the fact, too late for department planning and budgeting.
2. Trainings and continuous education did not continue after the initial investment into Key Results.
3. There were no administrative champions for Key Results.
4. Key Results typically consisted of a single measure which did not provide enough information to effectively describe a program's performance.
5. Key Results definitions were not clear enough or relevant enough to staff or the public.
6. Management, staff and the Board didn't always see the value of Key Results.
7. There was no leverage with the Key Results Measures; if the measure was bad, or if the data were missing it had no impact upon whether the program was funded.
8. Outcome measures were stressed but most Key Results were output measures.
9. Management and staff didn't develop or use measures that were useful program performance indicators.
10. There were few quality assurance steps integrated into the development or reporting of Key Results.

Training & Resources

Training & Resources

The Budget Office Evaluation staff are available to provide performance measurement training, assistance in measure development, and as a source of historical measurement and best practice knowledge. Some departments do not have formal evaluation units or specialized staff. In these cases, the Budget Office Evaluation staff will provide additional measurement development assistance. Regardless, every program offer must provide performance data.

The Budget Office Evaluation staff will provide several levels of training. First, general performance measurement training will occur in an integrated Budget Office training. More detailed trainings will occur for the county's research and evaluation staff and others interested.

During web-tool training, a technical hands-on training will occur. Additionally, Budget Office Evaluation staff will be keeping office hours, so that department staff can receive individualized attention via phone, email, or in person. Questions can be directed to Matt Nice at x83364 or Liang Wu at x22306. Any errors, omissions, or other issues with this manual should be reported directly to Matt Nice.

Special Thanks

This manual was developed based on a multitude of performance measurement source information. The information was adapted specifically for the Multnomah County Priority-Based Budgeting process. Budget Office Evaluation staff would be remiss if we did not specifically acknowledge the following sources: We can't measure what we do: Measuring what matters in the public sector by Mary Campbell; Fairfax County manages for results by Fairfax County Performance Measurement Team; Performance Measurement Challenges and Strategies by the White House Office of Management and Budget; and Not a Tool Kit by the Institute of Governance Ottawa Canada. Other sources that were used are listed in the Appendices.

Additional thanks are extended to the many county employees that offered for feedback and input into this initiative and manual.
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APPENDIX A: Glossary

Accuracy: the degree of conformity with a standard value (the "truth"). Accuracy relates to the quality of a result, and is distinguished from precision, which relates to the quality of the operation by which the result is obtained. The smaller the difference between the measurement and the standard value the greater the accuracy.

Baseline Data: Initial collection of data to establish a basis for future comparison, evaluation and target setting.

Benchmark: A standard or point of reference used in measuring and/or judging quality or value.

Best Practice: Superior performance with an activity, regardless of industry, leadership, management, or operational approaches; methods that lead to exceptional performance. Synonyms include best-known-methods (BKM) or evidence-based practices.

Continuous Improvement: on-going, incremental and measurable steps taken to enhance service delivery by improving efficiency and/or effectiveness.

Course Correction (Corrective Action): Action taken to rectify conditions adverse to quality and, where necessary, to preclude repetition.

Customer: The person or group that established the requirements of a process and receives or uses the outputs of that process, or the person or entity directly served by the organization.

Customer satisfaction: Reflects the degree to which a recipient’s experience with a desired service meets or exceeds their expectation. For purposes of priority-based budgeting, customer satisfaction measures should be primarily considered quality measures.

Data: Information or a set of facts presented in descriptive form.

Data Collection System: A broadly defined term indicating that a set of equipment, log books, data sheets, and personnel used to record and store the information required to generate the performance measurement of a process.

Efficiency: A process characteristic indicating the degree to which the process produces the required output at minimum cost.

Efficiency measure: An output or outcome relative to a unit of time, money or other input.

Factor: Also called a causal factor is an important contributor to a result; provides one cause-effect link to a result within a results map.

APPENDIX A: Glossary

Feedback Loop: A systematic series of steps for maintaining conformance to quality goals by feeding back performance data for evaluation and corrective action. This is the basic mechanism for quality control.

Frequency: One of the components of a performance measurement that indicates how often the measurement is made.

GASB: Governmental Accounting Standards Board (GASB) establishes and improves standards of state and local governmental accounting and external financial reporting.

Goal: Broad statement describing desired outcomes, but more specific than an agency's mission; they support the mission and identify specific strategies or opportunities for an agency to accomplish in order to achieve its mission.

High-level outcome: A measurable indicator of societal well-being—marquee indicators are a select number of high-level outcomes. Agencies and departments can define additional high-level outcomes pertinent to their organizational mission.

Indicator (measure/ metric): A quantifiable unit that provides information regarding the volume, financial performance, service quality, or results of a service which allows an observer to know whether performance is in line, ahead of, or behind expectations.

Initial outcome: A measure of desired result that represents a contribution to achieving a high-level outcome target examined shortly after service delivery.

Input: A measure of financial and non-financial (e.g., time, staff, etc.) resources. For the purposes of performance measures, staff and dollars should not be reported as inputs (these are covered elsewhere in the program offer).

Intermediate outcome: A measure of a desired result that represents a contribution to achieving a high-level outcome target.

Key Results: A single specific performance measures for each program from the 1996 RESULTS initiative.

Logic Model: A process presenting the relationship between inputs, activities, outputs and outcomes to describes the sequence of events for bringing about change.

Meaningful Measures: Performance indicators that directly, accurately and reliably assess a program's attributes, which can be readily understood.

Marquee Indicator: One of a select group high-level community or social indicators related to a specific Priority area.

Mission: A short, comprehensive description of why an organization exists. It succinctly identifies what an organization does (or should do), and for who it does it.

APPENDIX A: Glossary

Outcome: A measure of a desired result. In many cases, outcomes measure the result or impact of an output or set of outputs, and can be examined initially after service delivery or at longer intervals.

Outcome Teams: A group of various experts that staff one of six county priority areas who are responsible for requesting program offers, reviewing their content, and ranking how much contribution each offer has in it intended results.

Output: A measure of amount or frequency of products or services delivered.

Performance Management: The use of performance measurement information to help set performance goals; allocate and prioritize resources; inform managers to either confirm or change current policy or program direction to meet those goals; and report on the success of meeting those goals.

Performance Measurement: A process of assessing progress towards achieving predetermined goals, including information on the efficiency with which resources are transformed into goods and services (outputs); the quality of those outputs, i.e. how well they are delivered to customers and the extent to which customers are satisfied (service quality); and the qualitative results of a program activity compared to its intended purpose (outcome).

Plan, Do, Measure Cycle: A continuous process of steps for maintaining conformance to planning goals by feeding back performance data for evaluation and corrective action after activities have occurred.

Priority (budget priority): Represent six categories of citizen directed county government services, that include Basic Living Needs, Safety, Accountability, Education, Thriving Economy, and Vibrant Communities.

Priority Briefs: Monthly performance summaries that report workload data for the Safety and Basic Needs Priority areas.

Process: Any activity or group of activities that takes an input, adds value to it, and provides an output to a customer. The logical organization of people, resources, and procedures into work activities designed to produce a specified end result (work product).

Productivity: A measure of the value added by the outcome/ result divided by the value of the labor and capital consumed.

Program Modeling: Systematic process to identify a service's resources, activities and service population, output, and results. See logic model.

Quality: The degree to which a product or service meets the customer requirements and expectations. Customer satisfaction is a specific measure of quality.

APPENDIX A: Glossary

Quality Assurance: A process for the systematic monitoring and evaluation of the various aspects of data, measures, or results to ensure that standards of quality are being met.

Reengineering: A process of rethinking and redesigning work processes to achieve noticeable improvements in service delivery responsive to customer needs and/ or achieve significant reductions in cost.

Request for Offers: A process where Outcome Teams ask departments to submit program offers which are designed to respond to specific strategies outlined by the Outcome Team.

Results Map: Different from a strategy map, the results map shows only the results to be achieved and the main factors that influence those results.

Service Efforts and Accomplishments: A performance measure reporting mechanism for state and local governments that provides both financial and non-financial performance data necessary for assessing accountability and in making informed decisions.

Strategy: A set of actions chosen by an organization to achieve a result. A strategy is based on an understanding of (or assumptions about) the cause – effect connection between specific actions and specific results

Strategy Maps (Priority Maps): A visual representation of the pathway to the result. Using words or images, it helps viewers understand the cause-effect connection between actions or factors and the result.

Strategic Planning: A continuous and systematic process whereby an organization makes decisions about its future, develops the necessary procedures and operations to achieve that future, and determines how success is to be measured.

SWOT Analysis: Strength, weakness, opportunity, and threat analysis. An organization's self-assessment of its strengths and weaknesses (internal factors) as well as opportunities and threats (external factors).

Target: A program offer's state level of output and result.

Template: A document tool with a preset format used as a starting point for the development of the program logic-model and performance measurement selection.

Verification (validation): The determination than an improvement action has been implemented as designed.

Vision: A description of what and where an organization wants to be in the future.

Web-tool: An internet-based program offer input template for use with the Multnomah County Priority-Based Budgeting Process.

APPENDIX B: Additional Resources

The following lists additional resources, many of which were used in the development of this manual. This symbol 🕮 denotes material in the Budget Office Evaluation library available for check-out. Recommended source materials are denoted with this symbol ✓.

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Means…ends…indicators: Performance measurement in the public sector. Policy Brief #3. Institute on Governance. Ottawa, Ontario, Canada. April 1999.

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Meeting the Challenges of Performance-Oriented Government/ by Kathryn Newcomer, Edward T. Jennings, Jr., Cheryle Broom and Allen Lomax. Washington, D.C.: American Society for Public Administration, 2002.

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Who will bell the cat? A fable for our time: a guide to performance measurement in government / Price Waterhouse. -- Arlington, Virg.: Price Waterhouse, 1993.

APPENDIX C: Online Resources

(Online resources adapted from Mark Abrahams of the Abrahams Group)

Resources

Alfred P. Sloan Foundation, Performance Assessment of Municipal Governments Program http://www.sloan.org/programs/stndrd_performance.shtml

Association of Government Accountants, Certificate of Excellence in Service Efforts and Accomplishments Program http://www.agacgfm.org/performance/sea

GFOA Recommended Practice on Performance Management: Using Performance Measurement for Decision Making (2002) - Updated Performance Measures (1994) http://www.gfoa.org/services/rp/budget/budget-performance-management.pdf

GFOA Recommended Practice on Measuring the Costs of Government Services http://www.gfoa.org/services/rp/documents/MeasuringtheCostofGovernmentService.pdf

GFOA Best Practices in Public Budgeting http://www.gfoa.org/services/nacslb

ICMA Center for Performance Management http://www.icma.org/main/topic.asp?tpid=18&hsid=1&t=0

Portland Multnomah Progress Board http://www.portlandonline.com/auditor/?c=27347

Cities

City of Albuquerque Progress Report http://www.cabq.gov/progress/index.html

City of Ankeny, IA, Service Efforts and Accomplishments Report http://www.ci.ankeny.ia.us

City of Austin, Scorecard http://www.ci.austin.tx.us/budget/02-03/downloads/scorecard_2002.pdf

City of Bellevue, WA http://www.cityofbellevue.org/departments/Finance/pdf/03%20Perf%20Measures%20Book.pdf

City of Charlotte's Citizen's Annual Report http://www.charmeck.org/Departments/City+Manager/Annual+Report/Home.htm

City of Des Moines, Performance Measurement System http://www.ci.des-moines.ia.us/performance.htm

City of Kansas City (MO), City Auditors Report http://www.kcmo.org/auditor/annualreports/04annualreport.pdf

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City of Lynnwood WA, Accountability Report
http://www.ci.lynnwood.wa.us/Docs/2003AnnualPerformanceReport.pdf

City of Palo Alto CA, Service Efforts and Accomplishments Report
http://www.city.palo-alto.ca.us/auditor/ServiceEffortsandAccomplishments.html

City of Philadelphia, Mayor's Report on City Services
http://www.phila.gov/mayor/pdfs/csrreport2001.pdf

City of Phoenix, City Manager's Executive Report
http://www.ci.phoenix.az.us/MGRREPT/index.html

City of Portland (OR), Service Efforts and Accomplishments Report
http://www.portlandonline.com/shared/cfm/image.cfm?id=33651

City of San Diego, Service Efforts and Accomplishments Report
http://www.sannet.gov/city-manager/pdf/seaapril02.pdf

City of San Jose, City Service Area Performance Report
http://www.sanjoseca.gov/quest/Full%20Year-End%20CSA%20PM%20Report.pdf

City of Seattle, Performance Perspectives
http://www.cityofseattle.net/audit/report_files/pp_96-5.pdf

City of Winston Salem, Citizen Efficiency Review Committee Reports
http://www.ci.winston-salem.nc.us/ooe/frpt.htm

Counties

Clark County, 2003 Annual Performance Report
http://www.co.clark.nv.us/Public_communications/Performance_Report_2003/index_2003.htm

King County, WA Department of Natural Resources and Parks:
http://dnr.metrokc.gov/dnrp/performance/index.htm

Maricopa County AZ, Performance Report
http://www.maricopa.gov/Internal_audit/pdf/Reports/2004/67%20SEA%20Citizens%20Report%20internet%20report.pdf

Prince William County (VA) Service Efforts and Accomplishments Report
http://www.pwcgov.org/default.aspx?topic=040024000110002183

County of San Mateo, CA, Indicators for a Sustainable San Mateo County
http://www.sustainablesanmateo.org/

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States

Arizona, Managing for Results http://www.ospb.state.az.us/handbook.htm

Florida Government Accountability Report http://www.oppaga.state.fl.us/government/

Illinois Public Accountability Reporting
http://www.ioc.state.il.us/Office/PAP/reports.cfm

Illinois, Performance Audits http://www.state.il.us/auditor/special.htm

Iowa, Managing for Results http://www.resultsiowa.org/

Maine Marks http://www.mainemarks.org/indicators/indi_main.htm

Minnesota Milestones http://www.lmic.state.mn.us/datanetweb/chi.html and
http://www.mnplan.state.mn.us/pdf/2002/MilestonesMeasuresthatMatter.pdf

New Mexico Department of Transportation, Strategic Plan and Performance Report
http://www.nmshtd.state.nm.us/upload/contents/445/StrategicPlan2004.pdf

Oklahoma Health Care Authority, Strategic Plan and Performance Report
http://www.okhca.org/reports/PDFlib/strategic_plan_2006.pdf

Oregon Benchmarks http://egov.oregon.gov/DAS/OPB/obm.shtm

Oregon Commission on Children and Families, Outcomes and Accountability
http://www.oregon.gov/OCCF/Mission/Outcomes/miout.shtml

Oregon Department of Human Services, Annual Performance Report
http://egov.oregon.gov/DHS/publications/pm_reports/2004/2004_report.pdf

Rhode Island, Performance Measures http://www.budget.state.ri.us/measures.htm

Texas School Performance Review
http://www.window.state.tx.us/tspr/

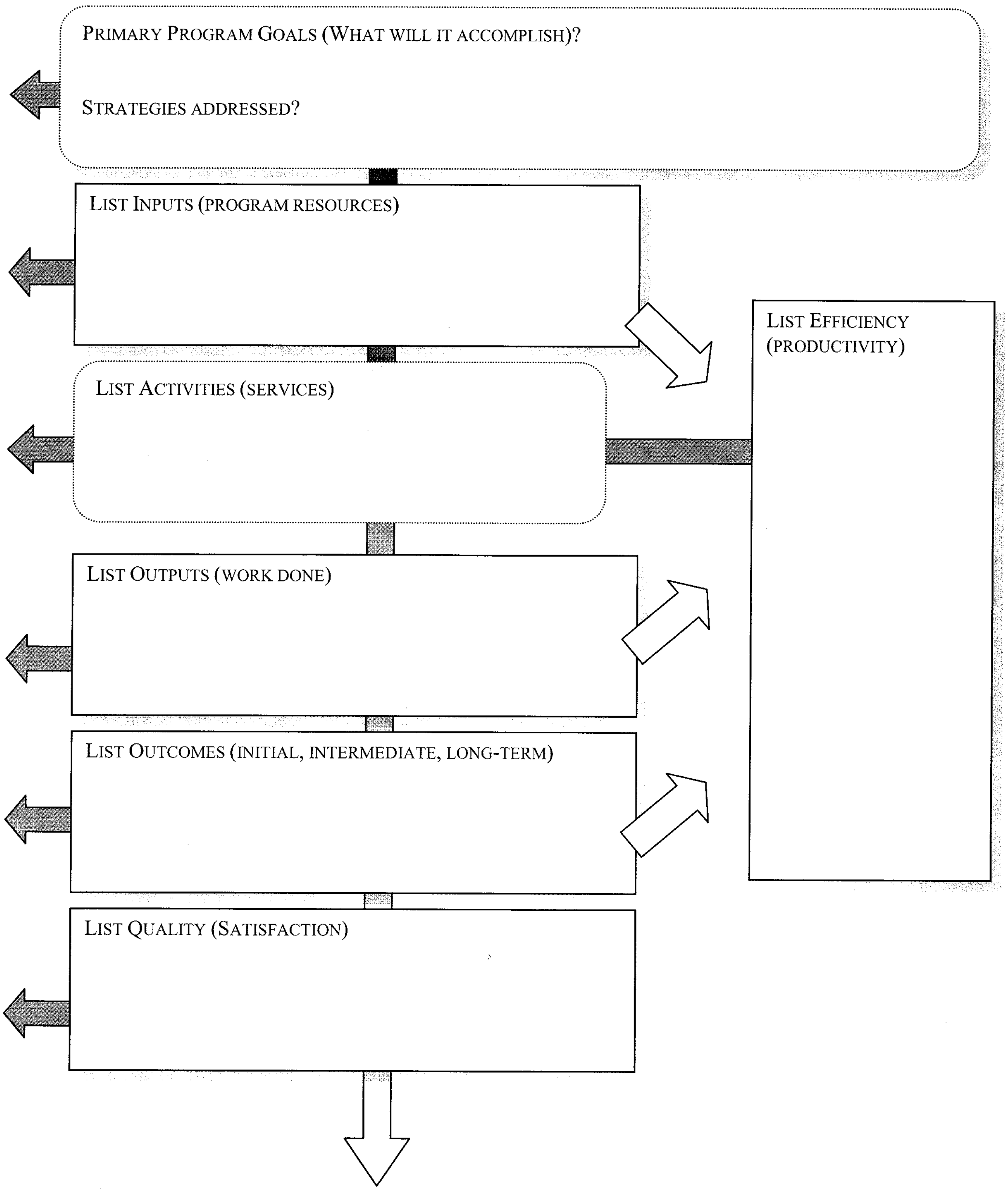
Utah, Summary of Goals and Key Performance Measures
http://governor.utah.gov/PLANNING/UtahTomorrow/StrategicPlan2000.htm

Virginia Review of Performance Measures
http://www.apa.state.va.us/data/download/reports/audit_local/PerfMeas02.pdf

Washington Department of Transportation, Measures, Markers, and Mileposts
http://www.wsdot.wa.gov/accountability/graynotebook.pdf

APPENDIX D: Templates

PART 1: LOGIC MODEL DEVELOPMENT



PART 2: PERFORMANCE MEASURE SELECTION

MARQUEE INDICATOR LINK
<identify the indicator>

PRIMARY PROGRAM GOALS (WHAT WILL IT ACCOMPLISH)?

STRATEGIES ADDRESSED?

MEASURE TYPE: <INPUT, OUTPUT, EFFICIENCY, OUTCOME, QUALITY>
DATA SOURCE: < WHICH DATA SYSTEM AND WHO> DATE: <COLLECTED WHEN>
TECHNICAL DEFINITION: <HOW IS THE MEASURE CALCULATED>

MEASURE TYPE:
DATA SOURCE: DATE:
TECHNICAL DEFINITION:

MEASURE TYPE: **OUTPUT**
DATA SOURCE: DATE:
TECHNICAL DEFINITION:

MEASURE TYPE: **OUTCOME**
DATA SOURCE: DATE:
TECHNICAL DEFINITION:

MEASURE TYPE:
DATA SOURCE: DATE:
TECHNICAL DEFINITION:

SELECTION CRITERIA:

- Meaningful-Valid
- Constant- Reliable
- Understandable-Clear
- Perverse Incentives
- Timely Reporting
- Comprehensive
- Not Redundant
- Cost to Collect Data
- Focused on Controllable Facets of Performance

CHECKLIST QUESTIONS:

- Does the program offer have measures related to the primary function of the program?
- Are the measure related to the marquee indicators?
- Does the program have true outcome measures?
- Can the average reader understand what the program accomplishes numerically?
- Are data missing in the table? If so, is it referenced in the explanatory section.
- Did the program meet or exceed it's targets? If not, is it referenced in the explanatory section?

PART 3: PERFORMANCE MEASURE DETAIL

AFTER CHOOSING A PERFORMANCE MEASURE, IT IS IMPORTANT TO ADD THE NECESSARY DETAIL BEHIND THE MEASURE IN ORDER TO CREATE ACCURATE, RELIABLE AND CONSISTENT MEASURES. DOCUMENTING THE CONTENTS OF A PERFORMANCE MEASURE ALSO PROMOTES RELIABILITY AND VALIDITY OF THE DATA BY PROVIDING A FRAMEWORK FOR CONSISTENT MEASUREMENT OVER TIME AND BETWEEN DIFFERENT PEOPLE. USE THIS TEMPLATE TO DOCUMENT THE DETAIL OF YOUR PERFORMANCE MEASURE.

MEASURE TITLE: <NAME OF MEASURE >

DESCRIPTION: <WHY USE THIS MEASURE? WHAT DOES THIS MEASURE PROVIDE?>

UNIT OF MEASURE: <HOW SHOULD THE RESULT OF MEASUREMENT BE EXPRESSED?> (PERCENTAGE, MINUTES, DOLLARS, CHILDREN SERVED?)

DATA REQUIREMENTS: <WHAT SPECIFIC DATA POINTS ARE NEEDED TO CALCULATE THE MEASURE? >

DATA SOURCE: <WHERE ARE THESE DATA POINTS STORED? HOW OFTEN SHOULD THIS MEASURE BE REPORTED? INDIVIDUAL OR GROUP RESPONSIBLE ?>

COLLECTION AND CALCULATION METHOD: <FORMULA OR PROCESS FOR CALCULATING MEASURE> (CALCULATING A PERCENT OR RATIO, ETC)

DATA LIMITATIONS: <ISSUES WITH DATA THAT MAY COMPROMISE MEASURE, SUCH AS MISSING DATA OR USE OF ESTIMATES >

PERFORMANCE MEASURE