WNCHEALTHYIMPACT

# Performance Accountability Worksheet

The purpose of this document is to guide program performance monitoring and improvement efforts. In particular, this worksheet was designed for use by hospitals and health departments in western North Carolina for use in understanding the impact of their community health improvement strategy and using the common language presented by Results-Based Accountability™.

## A. "DRAWING A FENCE" (NAME OF PROGRAM, PROJECT OR INITIATIVE)

For the purposes of learning, today, we are asking you to focus in on one, specific program, project or initiative for today's exercises. Name and briefly describe what you're identifying performance measures for. Your "fence" can go around a: CHIP program, project (event), or initiative. Be specific.

| |
|---|
| |

## B. CLARIFYING CUSTOMERS

### 1. WHO ARE OUR CUSTOMERS?

What population does the identified program, project or initiative serve? In other words, who do you hope is better off because of this effort? People are "better off" when they have a change in skills/knowledge, attitude/opinion, behavior, and/or circumstance (internal or external). Consider the following types of customers: primary vs. secondary; direct vs. indirect; or internal vs. external.

| Customers | Type (primary, secondary, direct, indirect, internal or external) |
|---|---|
| | |
| | |
| | |
| | |
| | |

## C. DEVELOPING PERFORMANCE MEASURES

### 2. HOW CAN WE MEASURE IF OUR CUSTOMERS ARE BETTER OFF?
### 3. HOW CAN WE MEASURE IF WE'RE DELIVERING SERVICES WELL?

> "All performance measures in the history of the universe can be derived from…three simple categories *How much did we do? How well did we do it?* And *Is anyone better off?*"
>
> —Mark Friedman, *Trying Hard Is Not Good Enough*

Identifying performance measures for your efforts helps you answer the question, "Are we doing things right?" The grid below summarizes the types of responses you would see by answering each of the 3 performance measure questions. This chart is a handy reference for when you choose performance measures for your program, project/event or initiative.

**SUMMARY OF PERFORMANCE MEASURES**

Helps us understand how many people we serve and what we do to serve them.

Helps us understand if we are delivering services well.

| How much did we do? | How well did we do it? |
|---|---|
| # Customers Served<br>*(by customer characteristic)*<br><br># Activities<br>*(by type of activity)* | % Common measures<br>*Workload ratio; staff turnover rate; staff morale; $ of staff fully trained; worker safety; unit cost;*<br>***Customer satisfaction: Did we treat you well?***<br><br>% Activity-specific measures<br>*Percent of actions timely and correct; percent clients completing activity/program; percent of actions meeting standards* |

Helps us understand if our customers are better off.

| Is anyone better off? | |
|---|---|
| # Skills/Knowledge<br><br># Attitude/Opinion<br><br># Behavior<br><br># Circumstance | % Skills/Knowledge<br><br>% Attitude/Opinion<br>***Customer satisfaction: Did we help you with your problem?***<br><br>% Behavior<br><br>% Circumstance |

Figure 4.16 p.78, THIGE

***Note for this section: Some of these measures you probably already collect, and others you may still need to gather.***

Complete the performance measurement categories (3 Questions) below for your specific customer for what you **"fenced"** today (additional copies of the worksheets are available):

**PERFORMANCE MEASUREMENT CATEGORIES**

| How much did we do? | How well did we do it? |
|---|---|
| | |
| **Is anyone better off?** | |
| # | % |

## D. IDENTIFYING "HEADLINE" MEASURES

**Our priority measures and how we will get the information we need:**

- In your completed performance measure grid, **circle** all of the measures for which you already have data or could easily get data.
- Of those circled measures, draw a **star** by the ones that are most important in each category. Select 3-5 stared or "headline" measures, including some measures from both the *How Well?* and *Better Off?* categories. These measures will help you talk about why what you do matters.
- Record your "headline" measure in the left column of the table below.
- In in right column, record where you get the data for your "headline" measures.

| **Important measures that we have = Headline measures** | |
|---|---|
| **Program Measures**<br>*Insert priority measures from section C that you have data for* | **How do you get this data?**<br>*Clarify where this information comes from (e.g., review existing documents, program observation, survey of participants, pre/post-test, etc.)* |
| | |
| | |
| | |
| | |
| | |

- Now look at the measures in your performance measurement categories that you do not have data for (those you didn't circle). From those measures select which ones you would want to figure out how to collect or access. Write these measures in the left column of the table below.
- Answer the question, "If you could buy one piece of data, what would it be?" Include it on the chart, below, too.
- In in right column, record your thinking about how you could get this data.

| **Important measures that we don't have yet = Data Development Agenda*** | |
|---|---|
| **Program Measures**<br>*Insert priority measures from section C that you need new or different data for* | **How will you get this information?**<br>*Clarify how you will get this data (e.g., review existing documents, program observation, survey of participants, pre/post-test, etc.)* |
| | |
| | |
| | |
| | |
| | |

**Note: some agencies may need technical assistance to collect data that does not yet exist. Please reach out to the WNC Healthy Impact if additional support is needed.* ***We can help****.*

**Box for notes or questions**

| Notes or Questions | |
|---|---|
| | |

## E. USING PERFORMANCE MEASURES TO IMPROVE PERFORMANCE

### 4. HOW ARE WE DOING ON THE MOST IMPORTANT OF THESE MEASURES?

- Select one of your headline measures
- Create a baseline
    - Show history of performance
    - Show forecast of where you are heading if you don't do anything differently
    - If the data is not handy, make a "best guess" about what this graph would look like
- What is the story behind this "curve"?
    - Why are things getting better? Or Why are things getting worse?
    - What are the causes and forces at work that explain this performance?
    - Take credit for what's working and be honest about what's not working
    - What else do you need to know in order to fully understand the story behind this curve?

### 5. WHO ARE THE PARTNERS WHO HAVE A ROLE TO PLAY IN DOING BETTER?

- Inside the organization/team/coalition?
- Outside the organization/team/coalition?
- What about customers?

### 6. WHAT WORKS TO DO BETTER, INCLUDING NO-COST/LOW COST IDEAS?

- Causes identified in the story point to possible action
- What do partners have to contribute?
- What does the research say about what works?
- Be creative, too.
- Include no-cost and low-cost ideas
- What else do I need to know?

### 7. WHAT DO YOU PROPOSE WE DO?

- Use criteria to select (specificity, leverage, values and reach)
- Complete a plan for improvement

| Task | Person Responsible | Start Date | End Date | Resources Needed |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |

The questions in this section are intended to be answered quickly and then repeated, regularly, for the life of the project/initiative/job function/event/program. This process can be completed in as little as 20 minutes.

### F. COMMUNICATION & USE OF FINDINGS (COVERED IN ADDITIONAL TRAINING OR 1-on-1)

Clarify the method and responsibilities for communicating and using the performance data on this program: Who will use it?

| Customer | Purpose | Method |
|---|---|---|
| *Ex. Board of Health* | *Monitoring program results* | *PowerPoint presentation* |
| *Ex. IRS* | *Compliance/accountability* | *Form 990 – Schedule H* |
| *Ex. Internal Program Team* | *Ongoing program improvement and monitoring* | *Review performance data spreadsheet/results scorecard quarterly* |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

**REFERENCES**

This tool was developed by the WNC Healthy Impact Evaluation Working Group through integration and modification of the following resources:

- "Trying Hard Isn't Good Enough" (Friedman 2009) and other materials available through www.raguide.org and www.resultsaccountability.com

**Please reach out to Jo Bradley, jo.bradley@wnchn.org if you have any questions or need additional assistance. For more information on WNC Healthy Impact, please visit www.WNCHealthyImpact.com.**