THE PERFORMANCE PRACTICE

LEARN. IMPROVE. REPEAT.

PRINCIPLES & PROOF POINTS

PILLAR 6

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Principle 6.1: The board, management, and staff work together to establish quantitative and qualitative indicators tightly aligned with the results they want to achieve, for each program and for the organization as a whole.

> 6.1.1: My organization has determined what we need to measure internally to continuously improve delivery of programs and confirm whether we are on track to achieve our intended results.

> 6.1.2: Our management and staff have identified what information we need for analysis of long-term patterns, trends, and correlations. (For example, how have the numbers served, outcomes, and cost per outcome changed over the past 24 months?)

Principle 6.2: Management and staff produce frequent reports on how well the organization is implementing its programs and strategies. Management and staff use these reports to chart course corrections and make operational adjustments and programmatic improvements on an ongoing basis.

> 6.2.1: My organization can generate timely and user-friendly reports from our data systems to help us gauge organizational and program effectiveness and drive improvements in all facets of our organization.

> 6.2.2: My organization has staff responsible for our data systems' implementation and maintenance. Responsibilities include:

> - providing ongoing training
> - supporting staff who have difficulties entering or accessing data
> - developing reports that show if the organization is achieving intended results
> - analyzing data in an ongoing way for quality assurance
> - ensuring data is accurate and entered in a timely manner
> - ensuring that the right people have the right information at the right time in the right form
> - planning system enhancements.

Principle 6.3: Management and staff make the collection, analysis, and use of data part of the organization's culture and daily operations. They ensure that people throughout the organization understand the key metrics. And they invest in ongoing training to help staff gain comfort in working with data as a natural part of their job.

> 6.3.1: My organization's staff—from the front lines to managers and executives—have access to data that help them do their jobs effectively on an everyday basis.

> 6.3.2: My organization's leadership regularly shares program and overall organization results with staff and board, allowing for questions, celebrating successes, and learning from failures.

Principle 6.4: Management and staff deploy systems to collect and analyze constituent feedback, drawing on existing tools whenever possible. The best systems not only help staff understand constituents' views; they also help ensure that participants play a role in creating needed improvements.

6.4.1: My organization has implemented a standardized process for regularly collecting our target population/target audience's feedback on how well they are being served by our programs and staff. We make this feedback accessible to and actionable for staff. We periodically share and discuss it with our target population/target audience as well.

6.4.2: My organization has assigned an individual or team to collect and respond to feedback from our target population/target audience in a timely manner.

Principle 6.5: Management and staff of direct-service organizations put special emphasis on data about recruitment and engagement of their target population so they can find out if they are reaching the people they aspire to serve and engaging them in activities long enough to make a difference.

6.5.1: To improve recruitment and engagement, my organization routinely collects data about participant characteristics (e.g., demographics and risk factors), recruitment, enrollment, participation, and exit.

Principle 6.6: Management and staff prioritize collecting information that's relevant for determining how well they are achieving the desired results, understanding what mix of efforts is critical to achieving those results, and continuously improving their results over time.

6.6.1: My organization periodically assesses whether the information we collect, analyze, and use continues to have high value and relevance. We can cite specific cases in which we added or deleted metrics based on what we have learned.

6.6.2: When possible, my organization engages in constructive dialogue with funders about their data requirements to ensure that the data we collect are meaningful to both our organization and the funder.

Principle 6.7: The board, management, and staff draw extensively on lessons from organizational assessments and evaluations of like programs serving similar causes or populations.

6.7.1: My organization invests in an evaluation and learning function to stay abreast of research and assessments/evaluations of similar programs. We use staff meetings, workshops, and other communication channels to share relevant findings.

6.7.2: My organization periodically brings in outside experts to brief our management and staff on the latest discoveries, trends in the field, and areas where we can improve.

Now that you've had a chance to carefully work your way through each proof point, we encourage you to take a step back and reflect on your organization's overall progress on Pillar 6.

Where are you excelling? Where are you falling short of your own expectations? What two or three actions could you take in the next 12 months to lead to the biggest improvement on your Pillar 6 self-assessment the next time around?

Given the importance of human capital for making progress on Pillar 6 do you have the "right people in the right seats" in the words of *Good to Great* author Jim Collins? What more could you do to develop the talent you have and find the additional talent you need? What talent actions would likely lead to the greatest improvements on your Pillar 6 self-assessment the next time around?

What additional resources or support do you need?

GLOSSARY

This glossary provides explanations of terms we used in this pillar. While not exhaustive, it includes terms that may have multiple meanings, due to different perspectives.

Evaluation – The systematic assessment, usually conducted by outside experts, of an organization's attempt to produce significant change through intentional actions. For information on the two key types of evaluations, see "Formative evaluation" and "Summative evaluation" below.[1]

Formative evaluation – An evaluation organizations commission to help them improve the performance of a program while it is underway. Also called *process evaluation*. Formative evaluations can be designed to assess any of the following aspects of program delivery: the quality of internal data; the fidelity of a program to its model; how well a program is recruiting and enrolling the population for which it is designed; program utilization, program completion, and participant engagement; and which clients achieve the intended outcomes, which do not, and which exit the program prematurely.

Outcomes – Socially meaningful changes for those served by a program, generally defined in terms of expected changes in knowledge, skills, attitudes, behavior, condition, or status. For example, a tutoring program might define its intended outcomes as measurable improvements in reading and math skills.[2]

Summative evaluation – Evaluation of a program in its later stages or after it has been completed to (a) assess its impact (b) identify the factors that affected its performance (c) assess the sustainability of its results, and (d) draw lessons that may inform other interventions. Summative evaluations are almost always performed by outside experts.[3]

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[1] Adapted from Hunter, David E. K. (2013). *Working Hard and Working Well: A Practical Guide to Performance Management for Leaders Serving Children, Adults, and Families.* Hartford CT: Hunter Consulting.

[2] Adapted from Morino, M. (2011). *Leap of Reason: Managing to Outcomes in an Era of Scarcity.* L. Weiss & Collins, C. (Eds.). Washington, DC: Venture Philanthropy Partners, in partnership with McKinsey & Company.

[3] Adapted from USAID (2009). *Glossary of Evaluation Terms.* Washington, DC: Planning and Performance Management Unit, Office of the Director of U.S. Foreign Assistance, United States Agency for International Development. Retrieved from http://pdf.usaid.gov/pdf_docs/Pnado820.pdf