Performance Management:
How to Use Data to Drive Programmatic Efforts

Office of Adolescent Health
Presented to Pregnancy Assistance Fund Grantees

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Webinar Objectives

1. Communicate why performance management is useful.

2. Develop a performance management system.

3. Describe how to use performance management data to improve programming.

Webinar Agenda

- Child Trends introduction

- What is performance management?

  - A practical definition

- Why is it important for an organization?

  - Is this a need for you?

- How is performance management implemented?

  - 4 steps in creating a performance management system
  - Policies and processes that need to be in place

- How is data used to drive programmatic activity?

  - Practical examples

- Things to remember

Who is Child Trends?

Child Trends seeks to improve the lives of children and youth by conducting high-quality research and sharing it with the people and institutions whose decisions and actions affect children.
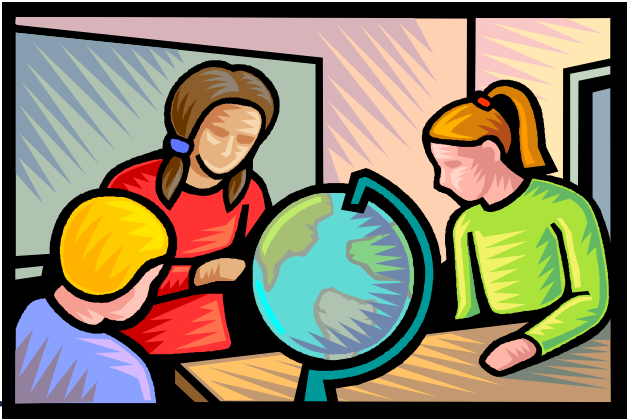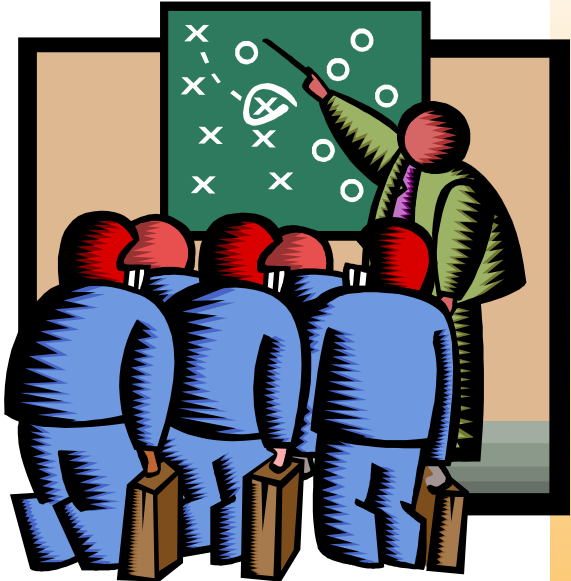
Our researchers work in a wide range of issues and areas.
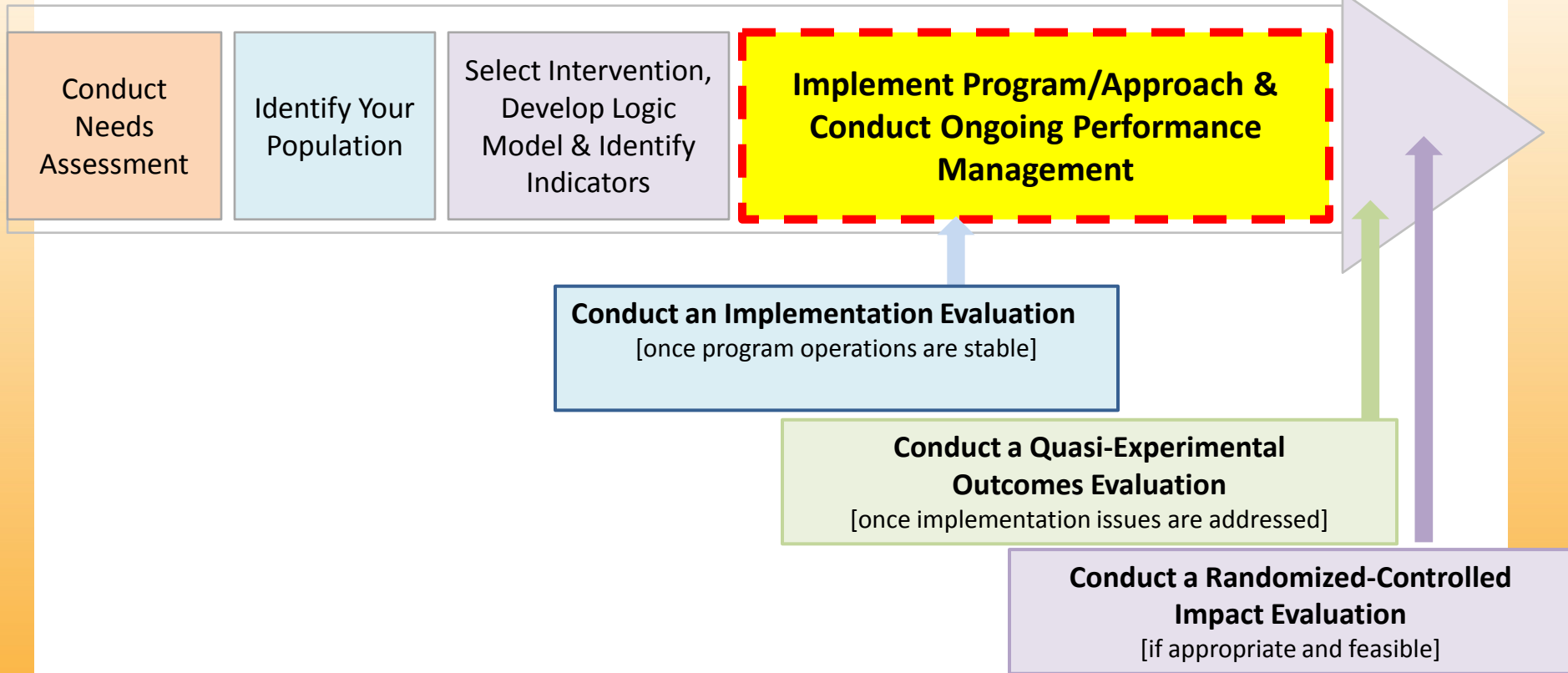
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What We Do

- Track & analyze trends and identify emerging issues
- Evaluate programs, collaborations, and policies
- Provide data-driven, evidence-based guidance on policy and practice
- Summarize, synthesize and communicate research literature
- Help inform the nation's research agenda for children

What is Performance Management?

Becoming Performance Driven

Targeting

Conduct Needs Assessment	Identify Your Population	Select Intervention, Develop Logic Model & Identify Indicators	**Implement Program/Approach & Conduct Ongoing Performance Management**

Conduct an Implementation Evaluation
[once program operations are stable]

Conduct a Quasi-Experimental Outcomes Evaluation
[once implementation issues are addressed]

Conduct a Randomized-Controlled Impact Evaluation
[if appropriate and feasible]

What is Performance Management?

"The systematic process by which an agency involves its employees, as individuals and members of a group, in the accomplishment of agency mission and goals."
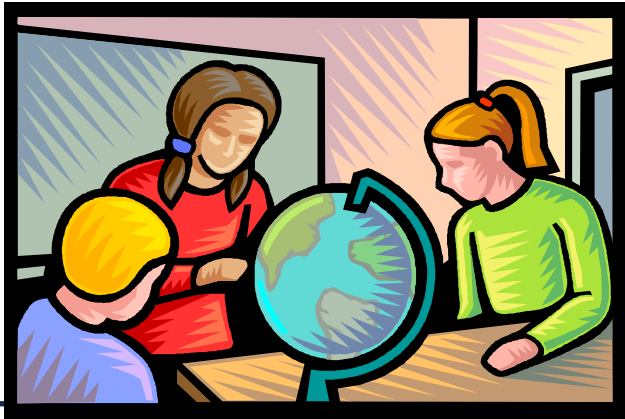
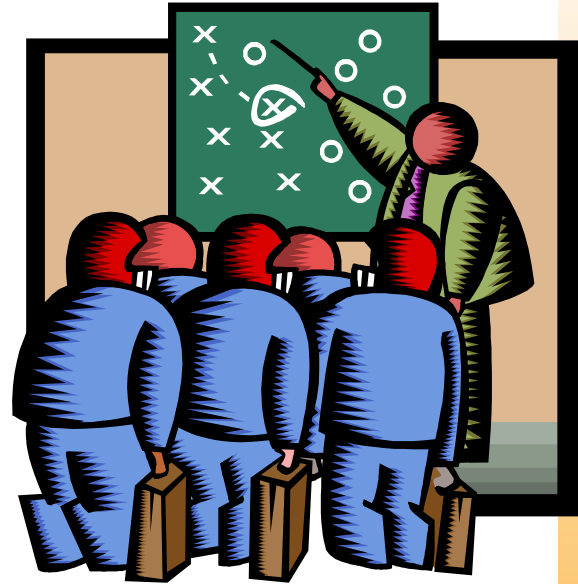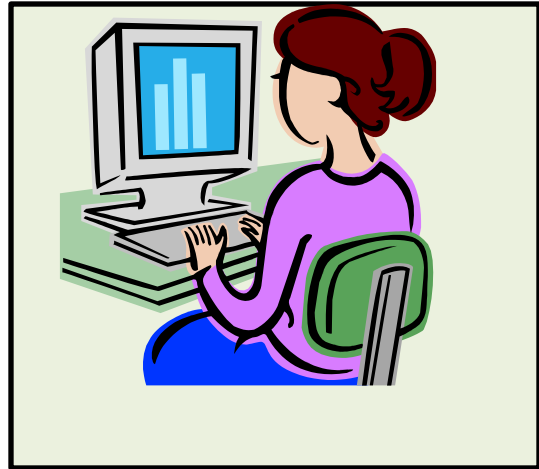The US Office of Personnel Management

What performance management means for your program in terms its implementation:

- Data Collection

- Analyze and share data

- Informs data driven decisions

…And do it on an ongoing basis

Why is Performance Management Important?

The Need for Performance Management

- All programs face increasing demands to demonstrate results and be accountable.

- Many programs are not as effective as they need to be, and performance management can help staff identify program areas that need attention.

What Data can be Collected in Performance Management?

Data related to:

- **Inputs:** Staff training and qualifications

- **Activities:** Type, amount, and quality of services provided

- **Outputs:** Participation levels and demographic characteristics of participants

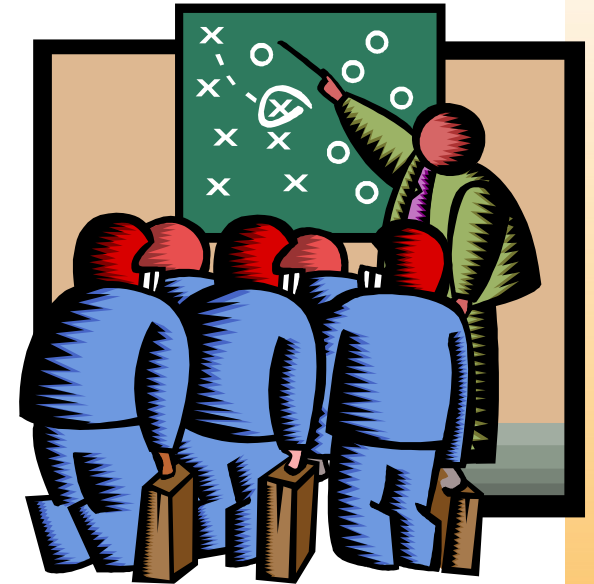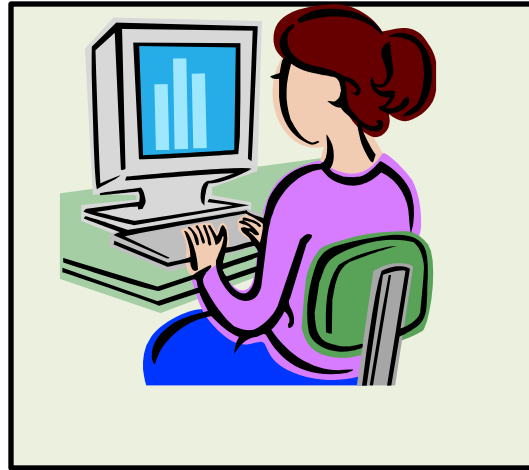- **Outcomes:** Short and/or long-term outcomes

Why is Performance Management Helpful?

- It allows you to answer the following questions

    - Are necessary **resources** (inputs) in place?

    - Are program **activities** being implemented as planned?

    - Are desired **outputs** achieved?

    - Do participants achieve desired **outcomes**?

- If you answer "no" to any of these questions then performance management provides direction on what needs improvement
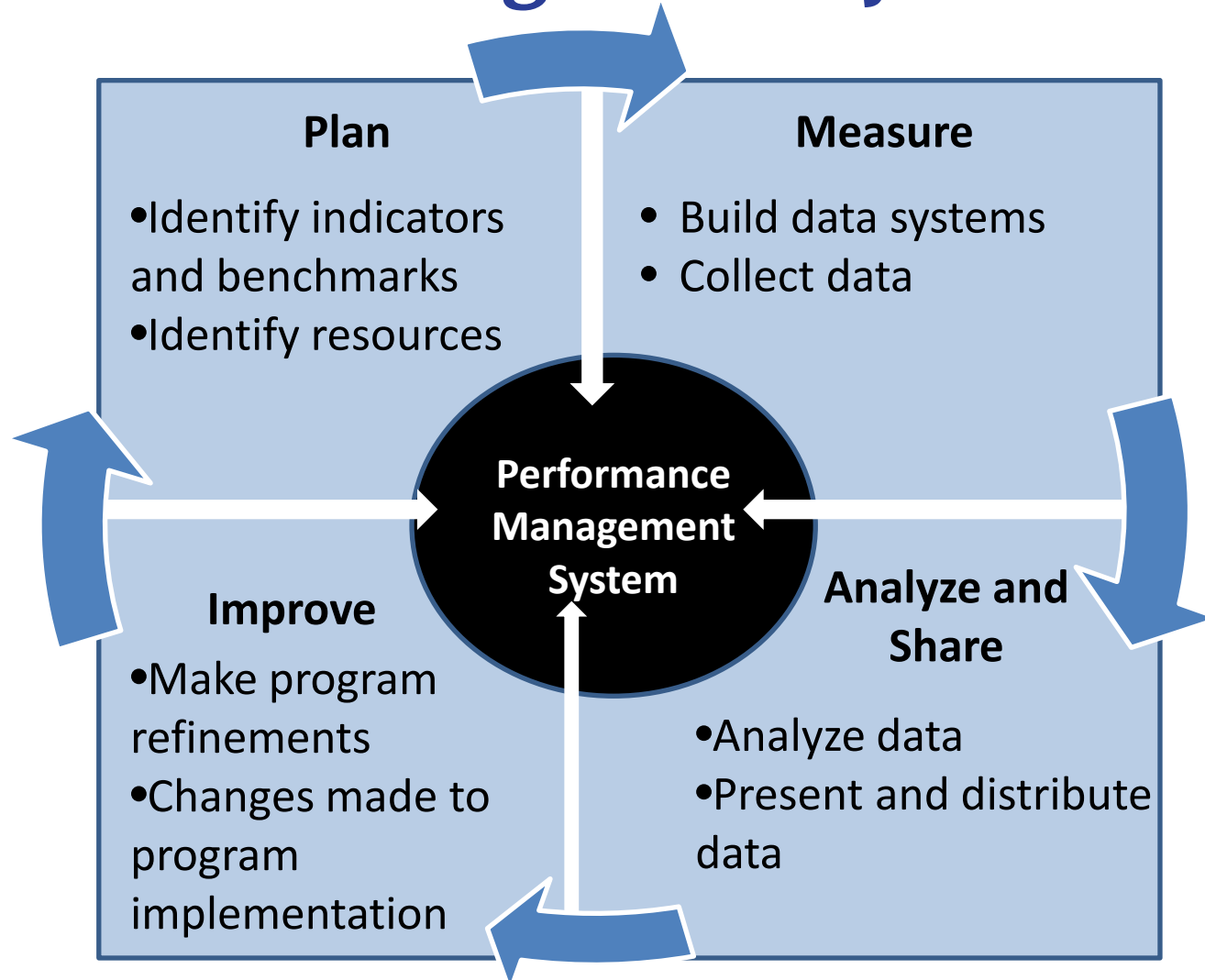
How is Performance Management implemented?

Performance Management System

Plan
- Identify indicators and benchmarks
- Identify resources

Measure
- Build data systems
- Collect data

Performance Management System

Improve
- Make program refinements
- Changes made to program implementation

Analyze and Share
- Analyze data
- Present and distribute data

What do you need to be successful in performance management ?

- **Develop a performance management policy**
  - Staff roles and responsibilities
  - Description of data collection and reporting methods
  - How often regular meetings should take place to review and discuss findings

- Once you have identified staff roles and responsibilities for collecting, analyzing, sharing and using data, include those responsibilities in your employee performance process

What do you need to be successful in performance management (cont.)?

- **Leadership**

- **Staff expertise**

- **Staff time**

- **Technology**

Types of Performance Management Data Systems

- **Microsoft products: Excel, Access**

- **Custom designed systems**

- **Commercially designed systems**

Performance Management Data Systems -- Key Elements to Assess

- Cost

- User Friendliness

- Unique Client Records

- Support for Direct Service Staff

- Support for Higher Level Management

- Other Items To Consider:
    - Web-based system
    - Scalability and ease of implementation
    - Quality and cost of training
    - System security
    - Tech support

How is data used to drive programmatic activity?
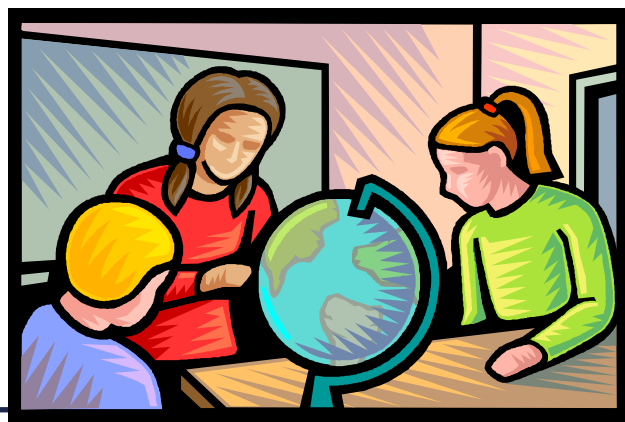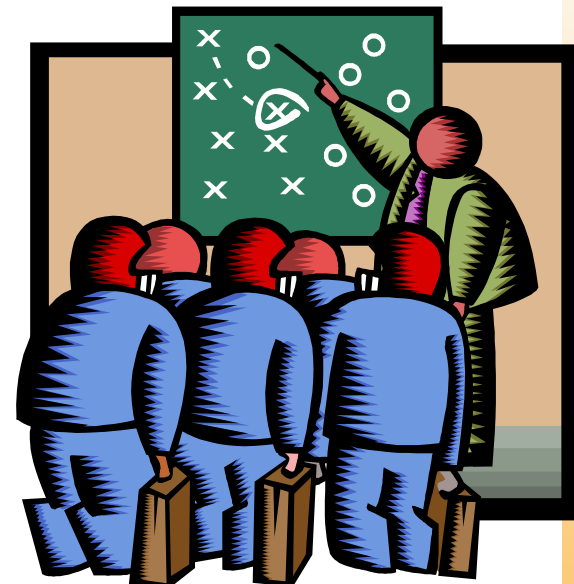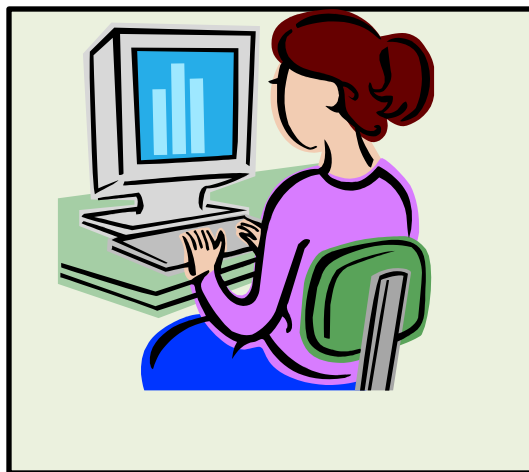
Practical Application: Recruitment Data

- How can I learn from <u>recruitment</u> performance data?

  - Understand discrepancies between intake and enrollment

    - Understand the demographics enrolling

    - Identify the recruitment approach that works

Practical Application: Attendance Data

- How can I learn from <u>attendance</u> performance data?

    - Changes to program or activities

    - Additional staff training needed

    - Improve consistency across sites

    - Adjust the timing of services
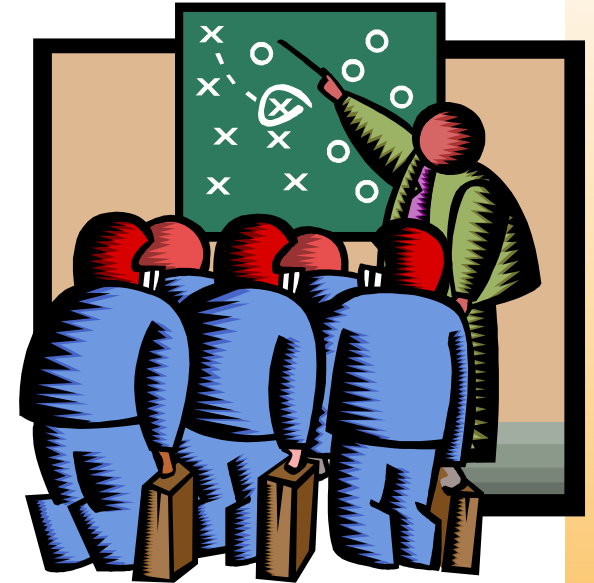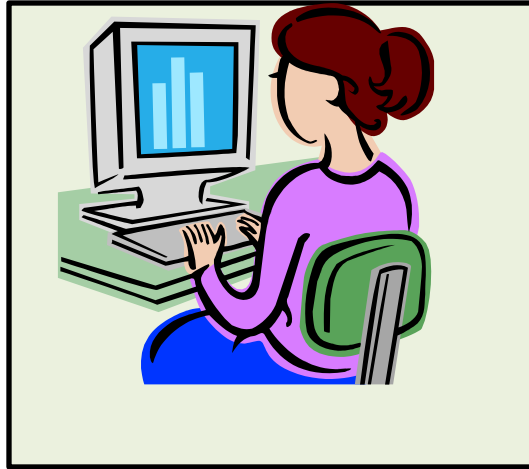
Practical Application: Outcome Data

- How can I learn from <u>outcome</u> performance data?

    - Changes to program or activities

    - Rethink target population

    - Additional staff training needed

Analytic Techniques and Traps

- Collect the data you need

- Ensure data quality

- Use the data consistently

- Maintain staff buy-in

Important to Remember…

Obstacles to performance management

- Organizational culture

  - A paradigm shift is needed

- Added Cost

  - Short term cost vs long term benefit

Things to Remember

- Be Patient

- Ensure quality in stages

- Be realistic about what can be collected and what it can tell you

- Ease data collection procedures wherever possible

- Show people how information is helpful

- Use incentives and positive reinforcement

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