Performance Management in a Collaborative Environment

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Today's Talk

- **What is performance management?**

- **Why is it important for an organization?**

- **How do you do it?**

- **Why is it important for a collaboration?**

- **What issues and challenges must be addressed in a collaborative effort to manage performance?**

Our Mission

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:

- Programs that serve children and families
- Policy makers
- Foundations and philanthropists
- The media

Child Trends' Expertise

Our researchers work in a wide range of issues and areas:

- Youth development
- Early childhood development
- Community Collaboration
- Evaluation

- Education
- Child welfare
- Fertility and Family Structure
- Fatherhood
- Indicators

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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]

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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

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What performance management means for your organization in terms of activity:

- **Collect data**

- **Analyze and share data**

- **Use data to improve performance**

…And do it on an ongoing basis

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What Data should be Collected in Performance Management?

Data related to:

- **Inputs: Staff training and qualifications**

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

- **Outputs: Participation levels and participant characteristics**

- **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**
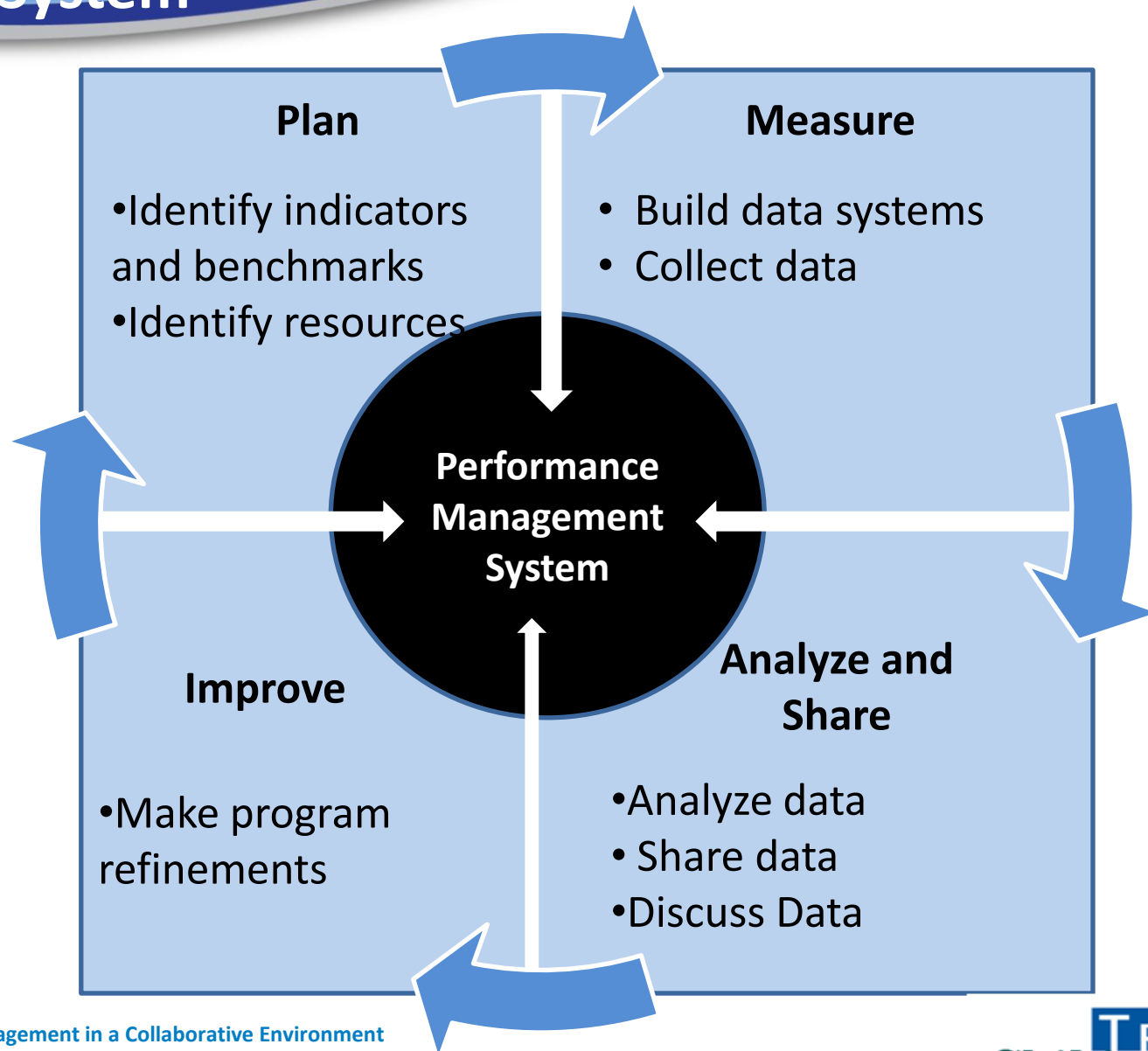
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Example from *Leap of Reason: Managing to Outcomes in an Age of Scarcity* by Mario Morino

- **Essay: *First Do No Harm…Then Do More Good*, by Isaac Castillo, of the Latin American Youth Center in Washington, DC**

- **www.leapofreason.org**

Performance Management System

Plan
- Identify indicators and benchmarks
- Identify resources

Measure
- Build data systems
- Collect data

Performance Management System

Improve
- Make program refinements

Analyze and Share
- Analyze data
- Share data
- Discuss Data

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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**

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Video Clip from
"Saving Philanthropy"
http://www.savingphilanthropy.org/preview-footage/

- **An example about how sharing performance management data on outcomes can increase staff buy-in, inspire youth, and create a learning culture**

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Why Do We Collaborate?

- **Provide program clients who have complex needs with coordinated services**

- **Bring agencies and organizations with different skill sets together to better serve clients**

- **Avoid service redundancies**

- **Identify and fill gaps in services in the local service community**

Why is Performance Management Important in a Collaborative Environment?

- **It permits partners to ask:**
  - Who are we serving?
  - Who aren't we serving?
  - What are we providing?
  - Do our referrals actually result in services?
  - What challenges are we facing?
  - How is our population doing?

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...A Brief Time Out to Explain the State of Performance Management in Collaborations

- **This is a developing area**
  - We're still developing questions that will help shape our efforts
  - We're still experimenting with how to share information across multiple agencies
  - The technological capacity to help collect and analyze data is relatively immature

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Performance Management Constraints that Arise in a Collaborative Environment

- **HIPAA and FERPA regul**ations

- **Multiple reporting requirements**

Fundamental Questions to Address When Developing A Performance Management System in a Collaborative Environment

- **Common Measures?**

- **Data collection and transfer?**

- **Staff and agency resistance?**

- **Technology?**

How Can you Address the Issues?

- **Marketing   (…just don't oversell)**

- **Leadership**

- **Training**

How Can you Address the Issues? (cont.)

- **Negotiation and memoranda of understanding**

- **Confidentiality agreements**

- **Use data to learn and celebrate**

Things to Remember

- **Be patient**

- **Do things 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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