

# Dollars and Sense - Using Technology to Organize, Measure, Improve and Report Organizational Performance

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# The Corporation For Standards and Outcomes

## Who We Are

CS&O is a leader in providing Web based solutions that integrate grants management and performance measurement to generate answers about outcomes in the public and private sector.

CS&O's flagship product is the Outcomes Collection, Evaluation and Reporting Service (OCERS).

With our company's roots in public service, CS&O is proud to be the primary provider of evaluation technology solutions for California's First 5 initiative involving \$700M in annual funds and over 1000 funded programs.

CS&O has the subject matter expertise to create a measurement and evaluation infrastructure for federal, state and local initiatives.

## Why Worry About Evaluating My Performance?

In today's society, there is a much greater call for transparency. Public and private agencies are under great scrutiny – with increasing pressure to account to the public for their use of tax dollars.

Characteristics of openness, inclusiveness and collaboration must be linked with informed accountability without abandoning the commitment to principles of public service.

# Operating Principles for Successful Performance Measurement

Use outcome-based accountability to define expected results and collect data to measure progress.

Implement an integrated, comprehensive and collaborative system of information and services, linking performance to results.

Change organizational culture through the use of targeted, time sensitive information.

Evaluating programs and identifying Best Practices result in:

Better flow of communication

Better understanding of needs/results

Better use of resources

Enhanced planning and follow-through.

## Addressing the Key Questions about My Programs

How are funds being used and what are the actual results?

Do the results reflect the intended goals and objectives?

How do the results map to external mandates?

Which programs and strategies have the greatest impact relative to cost?

Is there real data to demonstrate real success across an entire initiative?

How do the results compare to emerging benchmarks?

## What Works: Basic Implementation Principles

Start with the expectation of reporting results in a consistent way:

- Build it into all programs

- Require regular reporting

- Analyze the data and provide feedback.

Decide what to collect with the key players – leadership, staff, clients:

- What are the most important measures to demonstrate your results and tell your story?

- What are the key questions associated with those measures?

- Where are the answers to those questions? Who owns them?

Which programs and strategies have the greatest impact relative to cost?

Do results easily tie back to our strategic and to external mandates?

Once available, how do we use the data to improve ourselves?

## Case Study: CA Children and Families First Act of 1998

Now known as First 5 California.

California's voters passed a statewide ballot initiative adding a 50 cent sales tax to tobacco products sold in California. Generates up to \$700 million annually to build capacity and fund services promoting early childhood development and school readiness for children prenatal through age 5.

Vision: Improved child health; Improved child development; Improved family functioning; Improved systems to serve children & families.

Purposely non-categorical and flexible, allowing 58 County Commissions to fund a wide range of efforts within the framework of a formal Strategic Plan developed after extensive community input.

# Case Study - First 5 California : Defining the Outcomes

## Mandated use of Results-Based Accountability

Addresses five major questions:

What are a local County Commission's priorities, investments and strategies?

Do the funded programs make a measurable difference in the lives of children and families?

Are they positively impacting the system of services?

Can they be duplicated in future years?

Can they be sustained?

# Case Study - First 5 California: Lessons Learned in Local and Statewide Evaluation Efforts

Providers and funders need to:

Understand the context of service delivery within the larger system and the broader community.

Reach out and include all segments of the community to plan, implement and effectuate change.

Services must be viewed within an ecological framework of concentric yet interrelated circles of: children, their families and the community at large.

Be thoughtful in developing an evaluation framework, but recognize the need to move forward to capture baseline information.

Be educated as to reasonable expectations as capacity building occurs, allowing for appropriate mid-course corrections as the evaluation framework unfolds

# Measuring Performance

## Identifying Meaningful Measures

A measure is a specific data point

used to record your progress in meeting your goals.

Get better data using more meaningful measures.

Examples include:

Cost savings – service cost reduced

through innovative new approaches

Time measure – time required to address evolving needs

Process measure – team work enhancement; system integration and communication achieved through new technology or consolidation

Impact measure – collaboration; partnership; outreach campaign; community involvement; staff recruitment and retention.

# Measuring Performance Against Your Strategic Plan

## A Simple Hierarchy

Identify your most important Goals

Identify key Strategies

Identify your most powerful Activities

Identify ways to Measure your activities.

## A Sample Hierarchy Linking Goals to Measures

Identify your most important Goals – What are your budgetary, management and organizational goals for the next 3 – 5 years?

Identify key Strategies – Develop new, integrated health services in hard to serve communities.

Identify your most powerful Activities – Use Web based technology to enhance collaboration between agencies.

Identify ways to Measure your activities –

Costing measure – savings vs. old approach.

Time measure – increased access to services measured by decreased waiting list.

Process measure – better use of staff resources.

Impact measure – measurable increase in quality of life reduced school sick days.

## Technology: Provide A Comprehensive Solution

Web based solution that integrates performance measurement with grants management:

Unites diverse projects under a common strategic or performance plan.

Measures performance and tracks activities using well defined objectives and measures.

Reports on both qualitative and quantitative results.

Tracks assigned deliverables and project milestones within and across all projects and funding initiatives, across multiple grantees, locally or across the country.

## Technology: Implement A Flexible Solution

### Basic technology investment principles:

Leverage existing Internet technology

Consider proven “off the shelf” solution at a fraction of the cost of custom development.

Allow users to add programs, grants, and measures for scalability without additional programming.

Support rapid implementation to address immediate data collection needs.

Facilitate collaboration with online contact information, automatic broadcast messages, and integration with the user’s E-mail client.

# Summary Recommendations for Implementing Performance Measurement

Understand the terminology of accountability – a sometimes confusing jargon which, when simplified, enhances planning and performance.

Build and maintain a structured Performance Plan for your organization, linking all expected results to that plan.

Engage new partners and staff early on to identify with and achieve the highest level outcomes.

Incorporate a scheduled monitoring protocol that rewards success and guides improvements to build program capacity for high level performance.

Use appropriate technology.

Seek out feedback for continuous improvement.

Compare ongoing results to gauge success, overcome barriers and identify new opportunities.