Results-Based Accountability

The Fiscal Policy Studies Institute
Santa Fe, New Mexico

Websites
raguide.org
resultsaccountability.com

Book - DVD Orders
amazon.com
resultsleadership.org
Results Accountability is made up of two parts:

Population Accountability about the well-being of **WHOLE POPULATIONS**
For Communities – Cities – Counties – States - Nations

Performance Accountability about the well-being of **CLIENT POPULATIONS**
For Programs – Agencies – and Service Systems
Results Accountability

COMMON LANGUAGE

COMMON SENSE

COMMON GROUND

THE LANGUAGE TRAP
Too many terms. Too few definitions. Too little discipline

Benchmark

Outcome

Result

Modifiers
Measurable  Core
Urgent  Qualitative
Priority  Programmatic
Targeted  Performance
Incremental  Strategic
Systemic

Indicator

Goal

Measure

Target

Objective

Lewis Carroll Center for Language Disorders
DEFINITIONS

RESULT or OUTCOME
A condition of well-being for children, adults, families or communities.
Children born healthy, Children ready for school, Safe communities, Clean Environment, Prosperous Economy

INDICATOR or BENCHMARK
A measure which helps quantify the achievement of a result.
Rate of low-birthweight babies, Percent ready at K entry, crime rate, air quality index, unemployment rate

PERFORMANCE MEASURE
A measure of how well a program, agency or service system is working.
1. How much did we do?
2. How well did we do it?
3. Is anyone better off? = Customer Results

From Ends to Means
From Talk to Action

RESULT or OUTCOME

INDICATOR or BENCHMARK

PERFORMANCE MEASURE
Customer result = Ends
Service delivery = Means
IS IT A RESULT, INDICATOR OR PERFORMANCE MEASURE?

___ 1. Safe Community
___ 2. Crime Rate
___ 3. Average Police Dept response time
___ 4. An educated workforce
___ 5. Adult literacy rate
___ 6. People have living wage jobs and income
___ 7. % of people with living wage jobs and income
___ 8. % of participants in job training who get living wage jobs

Results – Indicators – Performance Measures in Amharic, Cambodian, Laotian, Somali, Spanish, Tigrigna, Vietnamese
### Translation Guide/Rosetta Stone

**Not the Language Police**

<table>
<thead>
<tr>
<th>Ideas</th>
<th>Group 1</th>
<th>Group 2</th>
<th>Group 3 etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A condition of well-being for children, adults, families &amp; communities</td>
<td>RESULT</td>
<td>OUTCOME</td>
<td>GOAL</td>
</tr>
<tr>
<td>2.</td>
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<tr>
<td>3.</td>
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<tr>
<td>etc.</td>
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</tr>
</tbody>
</table>

**Tool for Choosing a Common Language**

**Schematic**

<table>
<thead>
<tr>
<th>Ideas</th>
<th>Possible Labels</th>
<th>Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A condition of well-being for children, adults, families and communities</td>
<td>Result Outcome Goal</td>
<td>1.</td>
</tr>
</tbody>
</table>
POPULATION ACCOUNTABILITY

For Whole Populations in a Geographic Area

Fiscal Policy Studies Institute
Santa Fe, New Mexico
www.resultsaccountability.com
www.raguide.org

Community Outcomes for Christchurch, NZ

1. A Safe City
2. A City of Inclusive and Diverse Communities
3. A City of People who Value and Protect the Natural Environment
4. A Well-Governed City
5. A Prosperous City
6. A Healthy City
7. A City for Recreation, Fun and Creativity
8. City of Lifelong Learning
9. An Attractive and Well-Designed City
Results for
Children, Families and Communities
A Working List

Healthy Births
Healthy Children and Adults
Children Ready for School
Children Succeeding in School
Young People Staying Out of Trouble
Stable Families
Families with Adequate Income
Safe and Supportive Communities

Georgia Policy Council
for Children and Families

RESULTS

Healthy Children
Children Ready for School
Children Succeeding in School
Strong Families
Self Sufficient Families
Placer County, California

OUTCOMES for CHILDREN

SAFE

HEALTHY

AT HOME

IN SCHOOL

OUT OF TROUBLE

<table>
<thead>
<tr>
<th>Child's name</th>
<th>Date</th>
<th>Assessed by</th>
</tr>
</thead>
</table>

**SAFE**

1. 54321 Physical and emotional needs are being satisfied
2. 54321 Not subject to physical or emotional restraint
3. 54321 Not exposed to injury or illness
4. 54321 Not placed at risk of injury or illness
5. 54321 Well nourished, cared for, protected and respected

**HEALTHY**

6. 54321 Experiencing physical and emotional well-being, free of disease or recurring illness
7. 54321 Experiencing positive self-esteem and self-acceptance
8. 54321 Maintaining good hygiene and personal cleanliness
9. 54321 Free of illicit drugs and alcohol
10. 54321 Not pregnant or not expecting a pregnancy; if pregnant, participating in prenatal care
11. 54321 Achieving appropriate level of physical, mental and emotional development

**AT HOME**

12. 54321 Living with related family members in a safe, stable, nurturing environment
13. 54321 Interacting positively with all other persons at home
14. 54321 Resolving appropriate care, shelter, food and other amenities of life
15. 54321 Experiencing a positive family and community environment

**IN SCHOOL**

16. 54321 Enrolled in an educational program that meets abilities and goals
17. 54321 Participating, engaged in school work and learning
18. 54321 Earning good grades appropriate to ability, level of development and future goals

**OUT OF TROUBLE**

19. 54321 Obedient all times
20. 54321 Engaged in self-controlled, positive, non-violent behavior
21. 54321 Products and property are maintained
22. 54321 Not in trouble or at risk of truancy
23. 54321 Not associating or identified with gangs
24. 54321 Contributing to the health and safety of the community

**ASSESSMENT RATING KEY:**

- 5 = Sustaining the outcome with no support
- 4 = Sustaining the outcome with minimal support
- 3 = Fully meeting the outcome with moderate support
- 2 = Meeting the outcome with positive support
- 1 = In need
- 0 = Not met if outcome matters are unsupervised
MEANS not ENDS
To Improving Results In Themselves

1. COLLABORATION
2. SYSTEMS REFORM
3. SERVICE INTEGRATION
4. DEVOLUTION
5. FUNDING POOLS

Leaking Roof
(Results thinking in everyday life)

Experience:
Measure:
Story behind the baseline (causes):
Partners:
What Works:
Action Plan:
Population Accountability
Getting from Talk to Action

Population → Results → Experience

Indicators ← Baselines
(Data Development Agenda)

Story behind the baselines
(Information & Research Agenda about Causes)

Partners

What works
(Information & Research Agenda about Solutions)

Criteria

Strategy and Action Plan

The 7 Population Accountability Questions

1. What are the quality of life conditions we want for the children, adults and families who live in our community?

2. What would these conditions look like if we could see them?

3. How can we measure these conditions?

4. How are we doing on the most important of these measures?

5. Who are the partners that have a role to play in doing better?

6. What works to do better, including no-cost and low-cost ideas?

7. What do we propose to do?
Criteria for Choosing Indicators as Primary vs. Secondary Measures

**Communication Power**
Does the indicator communicate to a broad range of audiences?

**Proxy Power**
Does the indicator say something of central importance about the result?
Does the indicator bring along the data HERD?

**Data Power**
Quality data available on a timely basis.
Choosing Indicators
Worksheet

Outcome or Result: Safe Community

<table>
<thead>
<tr>
<th>Candidate Indicators</th>
<th>Communication Power</th>
<th>Proxy Power</th>
<th>Data Power</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure 1</td>
<td>H M L</td>
<td>H</td>
<td>H</td>
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<tr>
<td>Measure 2</td>
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<td>Measure 3</td>
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<tr>
<td>Measure 4</td>
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<td>Measure 5</td>
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<td>Measure 6</td>
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<td></td>
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<td>Measure 7</td>
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<tr>
<td>Measure 8</td>
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</tr>
</tbody>
</table>

Data Development Agenda

Three Part Indicator List for each Result

Part 1: Primary Indicators
- 3 to 5 “Headline” Indicators
- What this result “means” to the community
- Meets the Public Square Test

Part 2: Secondary Indicators
- Everything else that’s any good (Nothing is wasted.)
- Used later in the Story behind the Curve

Part 3: Data Development Agenda
- New data
- Data in need of repair (quality, timeliness etc.)
The Matter of Baselines

Baselines have two parts: history and forecast.

The Business Case for Investment in Prevention

Total Cost of Bad Results

United States 1970 to 2010

- Current $ — Constant $ — Forecast Current $ — Forecast Constant $
Boston Juvenile Homicides
1988 to 1998

Note: Juvenile is less than age 17.

Newcastle, UK

Source: Connexions Tyne and Wear, UK

Revised 9 Nov 2007

Sara Morgan-Evans
Performance Accountability
For Programs, Agencies and Service Systems

Fiscal Policy Studies Institute
Santa Fe, New Mexico
www.resultsaccountability.com
www.raguide.org

“All performance measures that have ever existed for any program in the history of the universe involve answering two sets of interlocking questions.”
**Performance Measures**

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How Much</strong> did we do? ( # )</td>
<td><strong>How Well</strong> did we do it? ( % )</td>
</tr>
</tbody>
</table>

**Performance Measures**

<table>
<thead>
<tr>
<th>Effort</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>How hard did we try?</td>
<td>Is anyone better off?</td>
</tr>
</tbody>
</table>
### Performance Measures

<table>
<thead>
<tr>
<th>Effort</th>
<th>How Much</th>
<th>How Well</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effect</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Performance Measures

<table>
<thead>
<tr>
<th>Input Effort</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How much service did we deliver?</td>
<td>How well did we deliver it?</td>
</tr>
<tr>
<td>Output Effect</td>
<td>How much change / effect did we produce?</td>
<td>What quality of change / effect did we produce?</td>
</tr>
</tbody>
</table>
### Performance Measures

<table>
<thead>
<tr>
<th>Effort</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much did we do?</td>
<td>How well did we do it?</td>
<td></td>
</tr>
</tbody>
</table>

### Education

<table>
<thead>
<tr>
<th>Effort</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much did we do?</td>
<td>How well did we do it?</td>
<td></td>
</tr>
<tr>
<td>Number of students</td>
<td>Student-teacher ratio</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effect</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is anyone better off?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#</td>
<td>%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effect</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is anyone better off?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of high school graduates</td>
<td>Percent of high school graduates</td>
<td></td>
</tr>
</tbody>
</table>
### Education

<table>
<thead>
<tr>
<th>Effort</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How much did we do?</td>
<td>How well did we do it?</td>
</tr>
<tr>
<td></td>
<td>Number of students</td>
<td>Student-teacher ratio</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effect</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Is anyone better off?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Number of 9th graders who enter college or employment after graduation</td>
<td>Percent of 9th graders who enter college or employment after graduation</td>
</tr>
</tbody>
</table>

### Pediatric Practice

<table>
<thead>
<tr>
<th>Effort</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How much did we do?</td>
<td>How well did we do it?</td>
</tr>
<tr>
<td></td>
<td>Number of patients treated</td>
<td>Percent of patients treated in less than 1 hour</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effect</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Is anyone better off?</td>
<td></td>
</tr>
<tr>
<td></td>
<td># children fully immunized (in the practice)</td>
<td>% children fully immunized (in the practice)</td>
</tr>
</tbody>
</table>
Drug/Alcohol Treatment Program

<table>
<thead>
<tr>
<th>Effort</th>
<th>Quantity</th>
<th>How much did we do?</th>
<th>Quality</th>
<th>How well did we do it?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of persons treated</td>
<td></td>
<td>Percent of staff with training/certification</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effect</th>
<th>Number of clients off of alcohol &amp; drugs</th>
<th>Percent of clients off of alcohol &amp; drugs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- at exit</td>
<td>- at exit</td>
</tr>
<tr>
<td></td>
<td>- 12 months after exit</td>
<td>- 12 months after exit</td>
</tr>
</tbody>
</table>

Fire Department

<table>
<thead>
<tr>
<th>Effort</th>
<th>Quantity</th>
<th>How much did we do?</th>
<th>Quality</th>
<th>How well did we do it?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number of responses</td>
<td></td>
<td>Response Time</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effect</th>
<th>Is anyone better off?</th>
<th># of fires kept to room of origin</th>
<th>% of fires kept to room of origin</th>
</tr>
</thead>
</table>
### Special Education

#### Quantity
- # students
- # assessments
- # IEP's

#### Quality
- Teacher retention rate
- Rate of disproportional representation
- % IEP's on time

#### Is anyone better off?
- % proficient (reading, math)
- % graduation
- % working or in school after graduation

### Professional Development

#### Quantity
- Customers
  - # teachers served
  - # students
  - # parents
- Activities
  - # training sessions
  - # hours of training
  - # study groups
  - # TA contacts
  - # mentoring relationships

#### Quality
- Common measures
  - % teachers certified in subjects they teach
  - % customers satisfied with how service is delivered
  - % staff with good morale
  - Unit cost per training unit (HL #3)
- Activity specific measures
  - % positive evaluations on training
  - % attendance in study groups
  - % of faculty participating in study groups
  - % mentoring pairs who complete mo. rept.
  - % mentees satisfied with match

#### Is anyone better off?
- % teachers satisfied that prof dev helped them be a better teacher (DDA #2)
- % teacher retention rate
- - total
- - "quality" teachers (DDA #1)
- % mentees who report relationship helped build their skills
- % teachers who demonstrate new skills
- - by observation (HL #2)
- - by self report
- % students in "trained" classrooms with improved test scores (HL #1)
- % students with reduced behavior problems
- % students with good school attendance
- % teachers who report better use of time
How much did we do?

General Motors

<table>
<thead>
<tr>
<th>Effort</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How much did we do?</td>
<td>How well did we do it?</td>
</tr>
<tr>
<td># of production hrs</td>
<td># tons of steel</td>
<td>Employees per vehicle produced</td>
</tr>
</tbody>
</table>

Is anyone better off?

<table>
<thead>
<tr>
<th>Effect</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td># of cars sold</td>
<td>% Market share</td>
</tr>
<tr>
<td></td>
<td>$ Amount of Profit</td>
<td>Profit per share</td>
</tr>
<tr>
<td></td>
<td>$ Car value after 2 years</td>
<td>% Car value after 2 years</td>
</tr>
</tbody>
</table>

Source: USA Today 9/28/98

Not All Performance Measures Are Created Equal

<table>
<thead>
<tr>
<th>Effort</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How much did we do?</td>
<td>How well did we do it?</td>
</tr>
<tr>
<td></td>
<td>Least Important</td>
<td>Also Very Important</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effect</th>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Is anyone better off?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Most Important</td>
<td></td>
</tr>
</tbody>
</table>


RBA Categories Account for All Performance Measures
(in the history of the universe)

- Efficiency, Admin overhead, Unit cost
- Staffing ratios, Staff turnover
- Staff morale, Access, Waiting time, Waiting lists, Worker safety

Customer Satisfaction
(quality service delivery & customer benefit)

- Cost / Benefit ratio
- Return on investment

Client results or client outcomes

* World’s simplest complete customer satisfaction survey

The Matter of Control

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much did we do?</td>
<td>How well did we do it?</td>
</tr>
</tbody>
</table>

Most Control

Least Control

Partnerships needed to improve performance
The Matter of Use

1. **The first purpose** of performance measurement is to **improve performance**.

2. **Avoid** the performance measurement **punishment trap**.
   - Create a healthy organizational environment.
   - Start small.
   - Build bottom-up and top-down simultaneously.

Comparing Performance

1. **To Ourselves First**
   Can we do better than our own history?

2. **To Others**
   When it is a fair apples/apples comparison.

3. **To Standards**
   When we know what good performance is.
The Matter of Standards

1. Quality of Effort Standards are sometimes **WELL ESTABLISHED**
   - Child care staffing ratios
   - Application processing time
   - Handicap accessibility
   - Child abuse response time

**BUT**

2. Quality of Effect Standards are almost always **EXPERIMENTAL**
   - Hospital recovery rates
   - Employment placement and retention rates
   - Recidivism rates

AND

3. Both require a **LEVEL PLAYING FIELD** and an **ESTABLISHED RECORD** of what good performance is.

Advanced Baseline Display

- **Goal (line)**
- **Target or Standard**
- **Your Baseline**
- **Comparison Baseline**

Create targets only when they are: **FAIR & USEFUL**

Avoid publicly declaring targets by year if possible.

Instead: Count anything better than baseline as progress.
Choosing Headline Measures and the Data Development Agenda

<table>
<thead>
<tr>
<th>Effort</th>
<th>Quantity</th>
<th>How much did we do?</th>
<th>Quality</th>
<th>How well did we do it?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Measure 1</td>
<td>-------------------</td>
<td>Measure 8</td>
<td>----------------------</td>
</tr>
<tr>
<td></td>
<td>Measure 2</td>
<td>-------------------</td>
<td>Measure 9</td>
<td>----------------------</td>
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<tr>
<td></td>
<td>Measure 3</td>
<td>-------------------</td>
<td>Measure 10</td>
<td>----------------------</td>
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<tr>
<td></td>
<td>Measure 4</td>
<td>-------------------</td>
<td>Measure 11</td>
<td>----------------------</td>
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<td>Measure 5</td>
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<td>Measure 12</td>
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<td>Measure 6</td>
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<td>Measure 13</td>
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<td>Measure 7</td>
<td>-------------------</td>
<td>Measure 14</td>
<td>----------------------</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Effect</th>
<th>Is anyone better off?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Measure 15</td>
</tr>
</tbody>
</table>

All Data have two Incarnations

Lay Definition
HS Graduation Rate
% enrolled June 1 who graduate June 15
% enrolled Sept 30 who graduate June 15
% enrolled 9th grade who graduate in 12th grade

Technical Definition

#1 DDA
#2 DDA
#3 DDA
#2 Headline
#3 Headline
#1 Headline
## Separating the Wheat from the Chaff

### Types of Measures Found in Each Quadrant

<table>
<thead>
<tr>
<th>How much did we do?</th>
<th>How well did we do it?</th>
</tr>
</thead>
<tbody>
<tr>
<td># Customers served</td>
<td>% Common measures</td>
</tr>
<tr>
<td>(by customer characteristic)</td>
<td>Workload ratio, staff turnover rate, staff morale, percent of staff fully trained, worker safety, unit cost, customer satisfaction: Did we treat you well?</td>
</tr>
<tr>
<td># Activities</td>
<td>% Activity-specific measures</td>
</tr>
<tr>
<td>(by type of activity)</td>
<td>Percent of actions timely and correct, percent customers completing activity, percent of actions meeting standards</td>
</tr>
</tbody>
</table>

### Is anyone better off?

<table>
<thead>
<tr>
<th>% Skills / Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td>(e.g. parenting skills)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Attitude / Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>including customer satisfaction: Did we help you with your problems?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>(e.g. school attendance)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Circumstance</th>
</tr>
</thead>
<tbody>
<tr>
<td>(e.g. working, in stable housing)</td>
</tr>
</tbody>
</table>
Performance Accountability
Getting from Talk to Action

Customers

Performance Measures → Baselines

- How much did we do?
- How well did we do it?
- Is anyone better off?

(Data Development Agenda)

Story behind the baselines

Information & Research Agenda about Causes

Partners

What works

Information & Research Agenda about Solutions

Criteria

Strategy and Action Plan

The 7 Performance Accountability Questions

1. Who are our customers?

2. How can we measure if our customers are better off?

3. How can we measure if we are delivering services well?

4. How are we doing on the most important of these measures?

5. Who are the partners that have a role to play in doing better?

6. What works to do better, including no-cost and low-cost ideas?

7. What do we propose to do?
## How Population & Performance Accountability Fit Together

The linkage between population and performance accountability is shown in the diagram below.

### POPULATION ACCOUNTABILITY

- **Healthy Births**: Rate of low birth-weight babies
- **Children Ready for School**: Percent fully ready per K-entry assessment
- **Self-sufficient Families**: Adult literacy rate

### PERFORMANCE ACCOUNTABILITY

<table>
<thead>
<tr>
<th>Customer Results</th>
<th>Performance Accountability</th>
</tr>
</thead>
<tbody>
<tr>
<td># students</td>
<td>Student / teacher ratio</td>
</tr>
<tr>
<td># reading at grade level</td>
<td>% reading at grade level</td>
</tr>
</tbody>
</table>

Local Education Agency

### Contribution relationship

- Alignment of measures
- Appropriate responsibility
Every time you make a presentation, use a two-part approach:

**Population Accountability**

**Result:** to which you contribute to most directly.

**Indicators:**

- [ ]
- [ ]
- [ ]
- [ ]

**Story:**

- [ ]

**Partners:**

- [ ]

**What would it take?:**

**Your Role:** in the context of a larger strategy.

**Performance Accountability**

**Program/Service:**

**Performance measures:**

- [ ]
- [ ]
- [ ]

**Story:**

- [ ]

**Partners:**

- [ ]

**Action plan to get better:**
Board of Directors Meeting

AGENDA

1. New data
2. New story behind the curves
3. New partners
4. New information on what works.
5. New information on financing
6. Changes to action plan and budget
7. Adjourn
Different Kinds of Progress

1. Data

   a. Population indicators: Actual turned curves: movement for the better away from the baseline.

   b. Program performance measures: customer progress and better service:
      - How much did we do?
      - How well did we do it?
      - Is anyone better off?

2. Accomplishments: Positive activities, not included above.

3. Anecdotes: Stories behind the statistics that show how individuals are better off.

What’s Next?
A Basic Action Plan for Results Accountability

TRACK 1: POPULATION ACCOUNTABILITY

- Establish results
- Establish indicators, baselines and charts on the wall
- Create an indicators report card
- Set tables (action groups) to turn curves

TRACK 2: PERFORMANCE ACCOUNTABILITY

- Performance measures, and charts on the wall for programs, agencies and service systems
- Use 7 Questions supervisor by supervisor and program by program in management, budgeting and strategic planning
“If you do what you always did, you will get what you always got.”

Kenneth W. Jenkins
President, Yonkers NY NAACP

THANK YOU!

Websites Supporting Results Accountability:
www.raguide.org
www.resultsaccountability.com

Book Orders:
www.trafford.com
www.amazon.com
Creating a Working Baseline from Group Knowledge

High School Graduation Rate

Now

Backcasting

75%

Forecasting

Not OK?
**Turn the Curve Exercise: Population Well-being**

5 min: **Starting Points**
- timekeeper and reporter
- geographic area
- two hats (yours plus partner’s)

10 min: **Baseline**
- pick a curve (or curves) to turn
- forecast – OK or not OK?

15 min: **Story behind the baseline**
- causes/forces at work
- information & research agenda part 1 - causes

15 min: **What works? (What would it take?)**
- what could work to do better?
- each partners contribution
- no-cost / low-cost ideas
- information & research agenda part 2 – what works

10 min: **Report** convert notes to one page

---

**ONE PAGE Turn the Curve Report: Population**

Result: _______________

**Indicator**

**Baseline**

**Story behind the baseline**

---------------------------

(List as many as needed)

**Partners**

---------------------------

(List as many as needed)

**Three Best Ideas – What Works**

1. ---------------------------
2. ---------------------------
3. ---------------------------

---

Sharp Edges
Turn the Curve Exercise: Program Performance

5 min: Starting Points
- timekeeper and reporter
- identify a program to work on
- two hats (yours plus partner’s)

10 min: Performance measure baseline
- choose 1 measure to work on – from lower right quadrant
- forecast – OK or not OK?

15 min: Story behind the baseline
- causes/forces at work
- information & research agenda part 1 - causes

15 min: What works? (What would it take?)
- what could work to do better?
- each partners contribution
- no-cost / low-cost ideas
- information & research agenda part 2 – what works

10 min: Report  Convert notes to one page
### Quality of Life Result:
E.g. A Clean Environment, A Prosperous Economy, Strong Stable Families, Children Ready for and Succeeding in School, etc.

### Why is this important?
Briefly explain, so a taxpayer could understand, why this quality of life condition is important to the people of Wyoming.

### How are we doing?
Show the 3 to 5 most important indicators in the form of baselines with at least 3 years of actual history. Optional: provide a 2 year forecast at current effort level.

<table>
<thead>
<tr>
<th>Indicator 1</th>
<th>Indicator 2</th>
<th>Indicator 3</th>
</tr>
</thead>
</table>

The story behind the baselines:
Explain, so a taxpayer could understand, the causes behind the indicator baselines above. Use additional data as necessary to tell this story.

### What it will take to do better and the role of state government:
Include no-cost and low-cost ideas and the role of the state’s partners.

### Appendix A: Data development Agenda: List priorities for new or better indicator data
**Wyoming Strategic Planning Design - Part II**  
Same format for Departments, Divisions and Programs

<table>
<thead>
<tr>
<th>Department/Division/Program:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Contribution to Wyoming Quality of Life:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Briefly explain, so a taxpayer could understand, how your (Dept/Div/Prog), in conjunction with other public and private partners, contributes to the quality of life of the people of Wyoming.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Basic Facts:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show total number of staff and size of budget in total and general funds.</td>
</tr>
<tr>
<td>List the 5 most important programs or functions and show annual number served,</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Performance:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show the 3 to 5 most important performance measures in the form of baselines with at least 3 years of actual history. Optional: provide a 2 year forecast of performance at current effort level.</td>
</tr>
<tr>
<td>Performance measures must be those that best answer the questions:</td>
</tr>
<tr>
<td>- How well are we delivering service?</td>
</tr>
<tr>
<td>- Are our customers better off? (CUSTOMER RESULTS)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Story behind (last 3 years of) performance:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Briefly explain, so a taxpayer could understand, the causes behind your performance for the last few years, including an explanation of the picture of performance shown in the baselines above. Reference your accomplishments where they have contributed. Use additional performance data as necessary to tell this story. Best formatting is short paragraphs with first sentence underlined.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What do you propose to do to improve performance in the next 2 yrs?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include no-cost and low-cost ideas and the contribution of partners. Best formatting is short paragraphs with action item underlined.</td>
</tr>
</tbody>
</table>

**Appendix A: Data development Agenda:** List priorities for new or better data on performance  
**Appendix B: Link to Budget:** Provide detail on priorities identified above which show in the current or proposed budget.
A 5-step method for identifying performance measures for any program in 45 minutes

The following five step scripted process is the best way to select the most important performance measures and identify a Data Development Agenda for any program or service. With practice, this process can be completed in about 45 minutes. Participants should each have a copy of the performance measurement summary on page 28.

**Step 1. How much did we do?** Draw the four quadrants on a piece of flip chart paper. Start in the upper left quadrant. Write down the measure “number of customers served.” Ask if there are better, more specific ways to count customers or important subcategories of customers and list them, such as the number of children with disabilities served.

Next, ask what activities are performed. Convert each activity into a measure. The activity of “training people” becomes number of people trained. Paving roads becomes number of miles of road paved. When you're finished, ask if there are any major activities that are not listed. Don’t try to get every last detail, just the most important categories of customers and activities.

**Step 2. How well did we do it?** Ask people to review the common measures listed in the upper right quadrant of the performance measurement summary. Write each one that applies in the upper right quadrant of the flipchart paper.

Next take each activity listed in the upper left quadrant and ask what measures tell how well that particular activity was performed. If you get blank looks, ask if timeliness or accuracy matters. Convert each answer into a measure and be specific. The timeliness of case reviews becomes percent of case reviews completed on time. If you are not sure whether a measure goes in the upper right or lower right quadrant, put it where you think best and move on. All the measures in both quadrants will be considered equally in Steps 4 and 5.

**Step 3. Is anyone better off?** Ask “If your program works really well, in what ways are your customers’ lives better? How could we observe this? How could we measure it?” Create pairs of measures (number and percentage) for each answer. For example, the number of clients who get jobs goes in the lower left quadrant. And the percent of clients who get jobs goes in the lower right quadrant. It saves time, when entering these measures, to write them only once in the lower right quadrant, and place # signs in the lower left quadrant across from each measure.

Identifying whether anyone is better off is the most interesting and challenging part of this process. Dig deep into the different ways in which service benefits show up in the lives of the people served. Explore each of the four categories of better-offness: Skills / Knowledge, Attitude / Opinion, Behavior, and Circumstance. If people get stuck, try the reverse question: "If your service was terrible, how would it show up in the lives of your customers?"
Look first for data that is already collected. Then be creative about things that could be counted and how the data could be generated. It is not always necessary to have data for all of your customers. Data based on samples can be used. Pre and post testing can be used to show improvement over time in skills, knowledge, attitude and opinion. When no other data is available, ask clients to self-report about improvements or benefits.

Keep in mind that all data have two incarnations: a lay definition and a technical definition. The lay definition is something that everyone can understand. The technical definition gives the exact way in which the measure is constructed. For example, “high school graduation rate” is a lay definition with many possible technical definitions. The easiest technical definition is the number who graduate on June 15th as a percentage of enrollment on June 1st. This will always be close to 100%. A tougher technical definition would compare graduation numbers to enrollment on September 30 of the previous year. A still tougher definition would compare graduation to the enrollment of 9th graders four years earlier. Each technical definition constitutes a separate measure.

When you complete step 3, you will have filled in the four quadrants with as many entries as possible. In steps 4 and 5, we use a shortcut method to assess the communication, proxy and data power of each measure and winnow these down to the most important measures.

**Step 4. Headline measures:** Review the list of upper right and lower right quadrant measures and identify those for which there is good data. By good data we mean that timely and reliable data for the measure is available today or could be produced with little effort. Put a circle next to each one of these measures. Next, ask "If you had to talk about the performance of your program in a public setting, such as a public hearing or conference, and you could only use one of the measures with a circle, which one would you choose?" Put a “#1” by the answer. Then ask "If you could have a second measure... and a third?" You should identify no more than 3 to 5 measures. These should be a mix of upper right and lower right measures. These choices represent a working list of headline measures for the program.

**Step 5. Data Development Agenda:** Ask, "If you could buy one of the measures for which you don't have data, which one would it be?" The word “buy” is used because data is expensive both in terms of money and worker time. With a different colored marker, write DDA #1 next to the chosen measure. "If you could buy a second measure... and a third?" List no more than 3 to 5 measures. These measures are the program’s Data Development Agenda in priority order.

This process leads to a three part list of performance measures:

- **Headline measures:** Those 3 to 5 most important measures for which you have good data, the measures you would use to present your program's performance in a public setting.

- **Secondary measures:** All other measures for which you now have good data. These measures will be used to help manage the program, and will often figure in the story behind the baselines.

- **Data Development Agenda:** A prioritized list of measures where you need new or better data. You will later need to make a judgment about how far down this list you can afford to go.
## TOOL FOR CHOOSING A COMMON LANGUAGE

<table>
<thead>
<tr>
<th>Framework Idea</th>
<th>Choices</th>
<th>Chosen</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Common Labels for Each Idea</td>
<td>Modifiers (if you must)</td>
</tr>
<tr>
<td><strong>A. The Basics</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. A condition of well-being for children, adults, families and communities stated in plain language</td>
<td>Result, Outcome, Goal, Vision</td>
<td>Population Community-wide (For &quot;client results&quot; see D3)</td>
</tr>
<tr>
<td>2. A measure that helps quantify the achievement of a result</td>
<td>Indicator, Benchmark</td>
<td>2.</td>
</tr>
<tr>
<td>3. A coherent set of actions that has a reasonable chance of working to improve results</td>
<td>Strategy, What works</td>
<td>3.</td>
</tr>
<tr>
<td>4. A measure of how well a program, agency or service system is working</td>
<td>Performance measure, Performance indicator</td>
<td>Program, Agency, System, Cross-system</td>
</tr>
<tr>
<td><strong>B. Other Important Ideas - Part 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. A picture of a desired future, one that is hard but possible to attain</td>
<td>Vision, Desired future</td>
<td>Often contains one or more results</td>
</tr>
<tr>
<td>2. The purpose of an organization</td>
<td>Mission, Purpose</td>
<td>2.</td>
</tr>
<tr>
<td>3. A person or organization who benefits from program or agency service delivery</td>
<td>Customer, Client, Consumer</td>
<td>3.</td>
</tr>
<tr>
<td>4. A person or organization who has a significant interest in the performance of a program, agency or service system</td>
<td>Stakeholder, Constituent</td>
<td>4.</td>
</tr>
<tr>
<td>5. A person or organization who has a role to play in improving results</td>
<td>Partner</td>
<td>Current, Potential</td>
</tr>
<tr>
<td>6. A visual display of the history and forecast(s) for a measure</td>
<td>Baseline, Trendline</td>
<td>6.</td>
</tr>
<tr>
<td>7. An analysis of the conditions, causes and forces at work that helps explain why a baseline looks the way it does</td>
<td>Story behind the baseline, Epidemiology, Etymology</td>
<td>7.</td>
</tr>
<tr>
<td>8. Possible actions that could make a difference on a result or performance measure</td>
<td>What works, Options, Strategy</td>
<td>Research-based Asset-based</td>
</tr>
<tr>
<td>9. A description of proposed actions</td>
<td>Action plan, Strategy, Strategic plan</td>
<td></td>
</tr>
<tr>
<td>10. The components of an action or strategic plan</td>
<td>Goals and Objectives, Planned actions</td>
<td></td>
</tr>
<tr>
<td>11. A description of the funding of existing and/or proposed actions</td>
<td>Budget, Funding plan</td>
<td></td>
</tr>
<tr>
<td>12. A document that describes what new data is needed or existing data that needs to be improved</td>
<td>Data Development Agenda</td>
<td></td>
</tr>
<tr>
<td>13. A document that describes what new information is needed about causes, conditions and/or what works</td>
<td>Information and Research Agenda</td>
<td>About causes, About solutions</td>
</tr>
<tr>
<td>14. A desired level of achievement for an indicator or performance measure</td>
<td>Target, Goal, Standard</td>
<td>Realistic, Arbitrary, Punitive, Insane</td>
</tr>
</tbody>
</table>
### C. Other Important Ideas - Part 2

1. A description of why we think an action or set of actions will work.
   - **Common Labels for Each Idea:** Theory of change, Logic model
   - **Modifiers (if you must):** Program evaluation
   - **Chosen:** Used at both the population and performance levels.

2. A structured analysis of how well a program is working or has worked.
   - **Common Labels for Each Idea:** Results Accountability
   - **Modifiers (if you must):** "Results Accountability" is sometimes used to describe all of 3 through 7 combined
   - **Chosen:** Program, Agency, Service system

3. A system or process for holding people in a geographic area responsible for the well-being of the total population or some defined subpopulation.
   - **Common Labels for Each Idea:** Performance accountability

4. A system or process for holding managers and workers responsible for the performance of their programs, agencies and service systems.
   - **Common Labels for Each Idea:** Results-based decision making, Outcome-based decision making

5. A system or process of working from ends to means, using population and/or program results to drive decisions about what to do.
   - **Common Labels for Each Idea:** Results-based budgeting, Outcome-based budgeting

6. A system or process of working from ends to means, using population and/or program results to drive the budget.
   - **Common Labels for Each Idea:** Results-based grantmaking, Outcome-based grantmaking

7. A system or process of working from ends to means, using population and/or program results to drive grantmaking decisions.

### D. Types of Performance Measures

1. Measures of the quantity or amount of effort, how much service was delivered.
   - **Common Labels for Each Idea:** How much did we do?, Input, Output, Resources, Process measure, Product measure

2. Measures of the quality of effort, how well the service delivery and support functions were performed.
   - **Common Labels for Each Idea:** How well did we do it?, Efficiency measure, Process measure, Customer satisfaction

3. Measures of the quantity and quality of effect on customers' lives.
   - **Common Labels for Each Idea:** Program, Agency, Service system

### E. A Basketfull of Modifiers to use with any of the above.

- Measurable, Urgent, Priority, Targeted, Incremental, Systemic, Core
- Quantitative, Qualitative, Positive, Negative, Short-term, Mid-Term, Long-term
- Intermediate, Internal, Informal, External, Eternal, Allegorical, Extraterrestrial
Elections Program (1330P)

Program Outcome Statement

The Elections Division promotes civic involvement in the election process by registering eligible voters and conducting honest and accurate elections on behalf of the citizens of San Mateo County.

Headline Measures

<table>
<thead>
<tr>
<th>Percent of Eligible Voters Registered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
</tr>
<tr>
<td>99-00</td>
</tr>
<tr>
<td>00-01</td>
</tr>
<tr>
<td>01-02</td>
</tr>
<tr>
<td>02-03</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Percent of Registered Voters Who Voted in Last Election</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
</tr>
<tr>
<td>99-00</td>
</tr>
<tr>
<td>00-01</td>
</tr>
<tr>
<td>01-02</td>
</tr>
<tr>
<td>02-03</td>
</tr>
</tbody>
</table>

Story Behind Baseline Performance

During FY1999-2000, Elections staff conducted the following purges of the voter file: SB 1313 purge (which requires the review and cleanup of voter files to ensure all information is current), targeting voters who had not voted in four years, and also Change of Address purge using post office data. More than 30,000 voters were removed from active voter file as a result of these efforts. There was a larger increase in voter registrations in February 2000, in anticipation of the March 2000 Presidential Primary Election. In addition, there was an increase in voter turnout during the November 2000 Presidential General Election. As anticipated, more people register and vote during a Presidential Primary and General Election. Voter registration and turnout is anticipated to drop off in FY 2001-02. However, voter registration and turnout will increase slightly in FY 2002-03 due to the November Gubernatorial Election.

What Will Be Done to Improve Performance in the Next Two Years

The Elections Office will meet performance targets by doing the following:

Continue Community Outreach and Education to Increase Voter Registration and Turnout
- Partner with League of Women Voters, community organizations, county agencies, political parties and other resources
- Develop a plan to coordinate the voter registration activities of the political organizations
- Partner with “Frontiers in Leadership" to engage in voter registration and voter turnout efforts
- Attend festivals and major community events to register people
- Conduct voter registration and voting classes in the community at key locations, including the community center and local schools

Source: County of San Mateo: Recommended Budget FY 2001-2002 FY 2002-2003
### Performance Measures Summary Table

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What/How Much We Do</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of new voters registered:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- North Fair Oaks</td>
<td>402</td>
<td>443</td>
<td>600</td>
<td>400</td>
<td>450</td>
</tr>
<tr>
<td>- All San Mateo County</td>
<td>22,404</td>
<td>24,482</td>
<td>25,000</td>
<td>20,000</td>
<td>25,000</td>
</tr>
<tr>
<td><strong>How Well We Do It</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percent of eligible voters registered to vote:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- North Fair Oaks</td>
<td>57.5%</td>
<td>55.1%</td>
<td>61.1%</td>
<td>58.6%</td>
<td>60.0%</td>
</tr>
<tr>
<td>- All San Mateo County</td>
<td>70.1%</td>
<td>66.0%</td>
<td>70.2%</td>
<td>67.7%</td>
<td>69.0%</td>
</tr>
<tr>
<td><strong>Is Anyone Better Off?</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of registered voters who voted in last election:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- North Fair Oaks</td>
<td>1,723</td>
<td>2,198</td>
<td>3,539</td>
<td>2,640</td>
<td>2,772</td>
</tr>
<tr>
<td>- All San Mateo County</td>
<td>150,967</td>
<td>181,190</td>
<td>261,297</td>
<td>207,268</td>
<td>217,631</td>
</tr>
<tr>
<td>Percent of registered voters who voted in last election:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- North Fair Oaks</td>
<td>36.3%</td>
<td>47.5%</td>
<td>70.0%</td>
<td>50.0%</td>
<td>55.0%</td>
</tr>
<tr>
<td>- All San Mateo County</td>
<td>44.8%</td>
<td>57.5%</td>
<td>77.0%</td>
<td>60.0%</td>
<td>65.0%</td>
</tr>
</tbody>
</table>

Source: County of San Mateo: Recommended Budget FY 2001-2002 FY 2002-2003
Goal 1: Excellent Student Performance

MEASURES

STORY BEHIND PERFORMANCE

KEY PARTNERS

ACTION PLAN

- Currently Working
- Proposed Next Year
- 2 - 10 Year Agenda

Appendices
A. Data Development Agenda
B. Information and Research Agenda (about causes & what works)
C. Partners Detail
D. Current Program Detail
E. Proposed Next Year Detail
F. 2 to 10 Year Agenda Detail
School Improvement Plan

STRUCTURE

OVERVIEW
1 page

Story
Action Plan
- Currently Working
- Proposed Next Year
- 2 - 10 Year Agenda

GOAL by GOAL PLAN
1 page per goal

Goal 1
Goal 2
Goal 3
Goal 4

Story
Action Plan
- Currently Working
- Proposed Next Year
- 2 - 10 Year Agenda

Appendices
A. Data Development Agenda
B. Information and Research Agenda (about causes & what works)
C. Partners Detail
D. Current Program Detail
E. Proposed Next Year Detail
F. 2 to 10 Year Agenda Detail
<table>
<thead>
<tr>
<th>Required Plans</th>
<th>X</th>
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<td>All students proficient in reading math and science</td>
<td>All teachers and para-professionals are highly qualified</td>
<td>All ELL students proficient in reading math and science</td>
<td>All students are safe and drug free</td>
<td>All students graduate from H.S.</td>
<td>All Parents are Involved</td>
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<td>% proficient Reading, Math and Science</td>
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<td>% retention highly qualified teachers</td>
<td>Ave class size</td>
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RESULTS ACCOUNTABILITY IMPLEMENTATION
Self Assessment Questions

1. Has your group or organization adopted a common language using the tool for choosing a common language or some other method? Does this common language allow you to clearly distinguish population and performance accountability?

2. Has your organization identified one or more population level results or conditions of well-being stated in plain language to which your work contributes?
   a. Have you identified the 3 to 5 most important indicators for each of these results?
   b. Have you created a baseline with history and a forecast for each of these measures?
   c. Have you analyzed the story and causes behind these baselines?
   d. Do you have a written analysis of what it would take to turn these conditions around at the national, state, county, city or community level?
   e. Have you articulated the role your organization plays in such a strategy?

3. Has your organization established the 3 to 5 most important performance measures for what you do, using the performance accountability categories How much did we do? How well did we do it? Is anyone better off?
   a. Have you created a baseline with history and a forecast for each of these measures?
   b. Do you track these measures on a daily, weekly, monthly or quarterly basis?
   c. Do you periodically review how you are doing on these measures and develop action plans to do better using the performance accountability 7 questions?
   d. Have you adapted your organization’s management, budget, strategic planning, grant application, and progress reporting forms and formats to reflect systematic thinking about your contribution to population conditions and your organization’s performance?

4. Are the population and performance baseline curves you are trying to turn displayed prominently as one or more charts on the wall?

5. Have you identified an in-house expert to train and coach other staff in this work?

6. Have you turned any curves?