

# HUMAN SERVICES WORKSHOP: PERFORMANCE MEASURES AND INDICATORS

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**WELCOME!**



# TODAY'S OBJECTIVES

By the end of the session, participants will be more familiar with:

1. County and Town approaches to measuring human services results
2. Elements of a Results Framework, including outcomes versus outputs
3. How to select and/or develop performance measures and indicators
4. How to track and report on performance data

# AGENDA



Welcome and Introductions

Understanding Board Priorities

Introducing the Results Framework

Preparing Myself for the Application

Tracking and Reporting Data

Putting it all together: Completing the Town/County Application

Review/Q&A

Adjourn



# BOARD PRIORITIES

# HUMAN SERVICES BOARD PRIORITIES

The Town of Chapel Hill and the Town of Carrboro's Human Services Program funds programs that improve

EDUCATION \* LIVELIHOOD SECURITY \* HEALTH

Their overarching goal is to achieve economic and social wellbeing and opportunities to thrive for all residents, particularly those who are low-income or otherwise disenfranchised.

# ORANGE COUNTY BOARD PRIORITIES

- Ensure basic human services
- Create a balanced, dynamic local economy
- Promote governance that reflects community values
- Achieve a high performing County government
- Create, preserve, and protect a natural environment
- Ensure a high quality of life and lifelong learning

# PARTICIPANT PRIORITIES

## *Getting to Know You:*

- Write in the chat your name and the organization you are with
- Share in one sentence the change your organization is trying to make with the program you seek funding for





# THE RESULTS FRAMEWORK

# COMPONENTS OF A RESULTS FRAMEWORK

## Activities

- Events (training program, distributions)
- Actions (counselling, health checks)
- Goods & Services Delivered

## Resources Invested

- Human Resources (staff, volunteers)
- Materials/Supplies
- Equipment
- Funding

## Intermediate Results

- Immediate changes in knowledge & behavior of a group
- Evidence of change in systems, policies or institutions

## Strategic Objectives

- Short-Term benefits expected to occur for target group(s)

## Goals

- Longer-term, greater change to which the program contributes

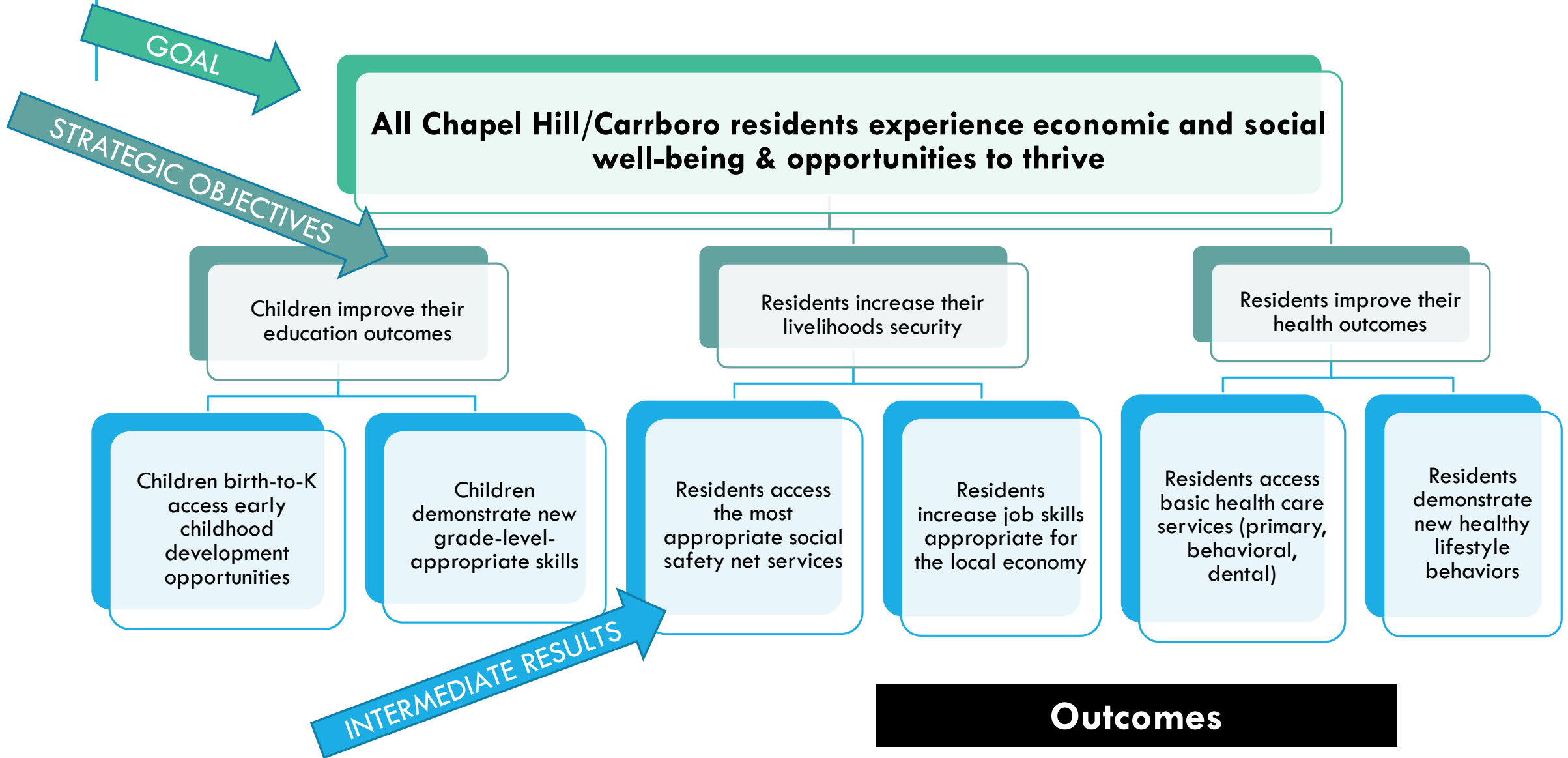
**Outputs**

**Inputs**

**Outcomes**

**Performance Indicators - *Indicators of Success***

# WHAT PART OF A RESULTS FRAMEWORK ARE BELOW?



# WHAT ARE OUTCOMES VS OUTPUTS ?

## **Expected Change (Outcomes)**

### *Long-term Goal*

End world hunger

### *Strategic Objective*

Single moms in the Town have access to food through deliveries

### *Intermediate Objective*

Single moms who attend workshop can sign up for food deliveries

## **Activities (Outputs)**

- Workshops held
- Taskforce is convened
- Food boxes delivered
- Curriculum developed
- Food demonstrations conducted



# OUTCOMES MUST BE MEASURABLE


They are:

- **Specific** – What does the project intend to change?
- **Measurable** – Can the indicator be assessed objectively, independently, accurately and consistently?
- **Achievable** – Is it possible for the project to accomplish the indicator?
- **Relevant** – Is the indicator applicable to the context and the project, as well as practical or cost-effective to use?
- **Time-bound** – Can the indicator be achieved during the project's time period?

Towns provide some for you, connected to their intermediate results; pick one that is meaningful to you and that you can measure

You can also have your own

# QUIZ! OUTCOME VS. OUTPUT VS. OBJECTIVE

Output!	Intermediate Result	Objective!
Food baskets are delivered to program participants	Participants utilize the produce provided in their food basket	Food security of the target population increased
Clients increase knowledge of personal finance management 	Clients demonstrate personal finance skills	Clients' increase their savings
Targeted households receive scholarships to local 5-star childcare centers	Children in targeted households regularly attend 5-star childcare	Children in targeted households enter school "kindergarten ready"



# PREPARING FOR THE APPLICATION

(practice run)



**HOW DOES MY ORGANIZATION FIT IN TO THE GOALS  
AND OBJECTIVES OF THE HUMAN SERVICES BOARD?**





## GUIDED ACTIVITY

- 1) Look at the your program goals/objectives
- 2) Select the immediate result from the County/Town framework that best aligns with the program/service you wish to have funded
- 3) Check off what Strategic Objective that Immediate Result was under (Town) or select that Board Priority (County)
- 4) What activity do you want to carry out and for whom?

# WHAT MOVED YOU TO ACTION?



**Need or Concern**

Kids spend too much time indoors in front of a TV or computer

**Vision**

All youth live happy and health lives

**Mission**

ABC organization helps parents rear healthy happy kids

# IDEA: HOW IT WILL BE ADDRESSED?

2

**Activities**

Workshops

**Focused on whom?**

Parents of 12 – 14 year olds

**Resources**

Parent educator, small classroom, parent folders, snacks, table and chairs, note pads, pens, etc.

# WHAT CHANGE DO YOU WANT TO AFFECT?



**Intermediate Results**  
(Outcome)

Parents will demonstrate the ability to engage their kids in recreational activities they organize at home

**Strategic Objective**  
(Outcome)

Increase the # of youth ages 12 - 14 who replace screen time with physical activity

**Ultimate Goal**  
(Outcome)

All youth live happy and health lives

# HOW DOES MY ORGANIZATION FIT IN TO THE GOALS AND OBJECTIVES OF THE HUMAN SERVICES BOARD?

## ***Goal:***

All youth live happy and health lives

## ***Strategic Objectives:***

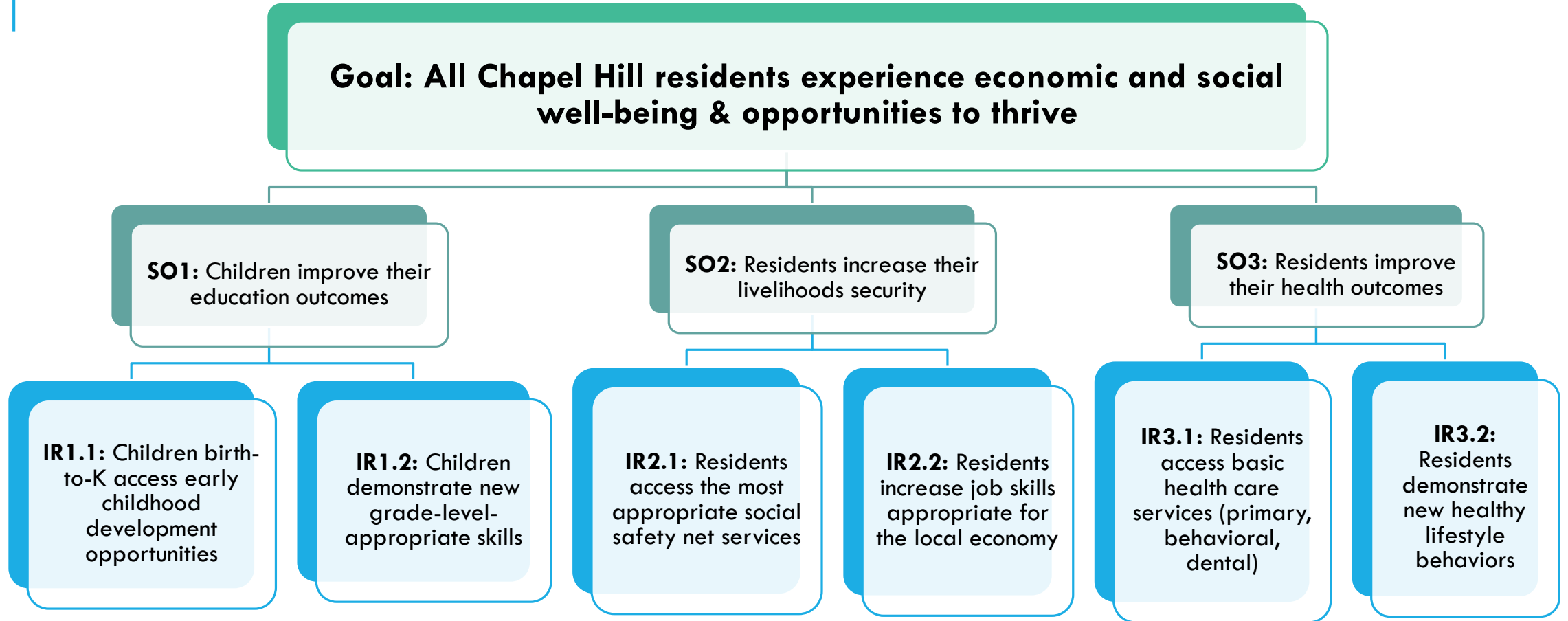
Reduce the amount of time kids spend indoors in front of a TV or computer

## ***Intermediate result:***

Parents will demonstrate the ability to engage their kids in recreational activities they organize at home

**SO3 & IR3.2**

# HUMAN SERVICES RESULTS FRAMEWORK – CHAPEL HILL & CARRBORO



HOW DO YOU KNOW YOU ARE SUCCESSFUL?

*Indicators of Success*

HOW DO YOU DOCUMENT YOUR SUCCESS?

*Data, Evidence*

# OUTCOMES HAVE INDICATORS TO MEASURE PERFORMANCE

Can be quantitative or qualitative:

**Quantitative: assigned a numeric value and measured**, such as number, ratio, ranking, percentage, frequency, growth rate or yield; or

**Qualitative: descriptive and based on judgment or perception**, such as level of participation, group cohesion or satisfaction; decision-making or leadership capacity; or attitudinal or behavioral change

Like outcome statements, outcome indicators should also be SMART.




# PERFORMANCE INDICATORS (FOR CHAPEL HILL AND CARRBORO APPLICANTS)

<p><b>Strategic Objective 1</b> (please choose one from the Results Framework)</p>	<input type="checkbox"/> Children improve their educational outcomes		
	<input type="checkbox"/> Residents Increase their livelihood security		
	<input checked="" type="checkbox"/> Residents improve their health outcomes		
<p><b>Intermediate Result</b> (please choose one from the Results Framework)</p>	<p><b>IR3.2: Residents demonstrate new healthy lifestyle behaviors</b></p>		
<p><b>RESULTS</b></p>	<p>Actual 2017-18</p>	<p>Estimated 2018-19</p>	<p>Projected 2019-20</p>
<p><b>Performance Indicators</b> (Please choose at least one performance indicator to report on from the Results Framework, and add additional performance indicators that you would like to report to the Towns. Please insert additional rows as needed, listing one per row).</p>			

# ORANGE COUNTY BOARD PRIORITIES

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# CHECK-IN / QUESTIONS



# TRACKING AND REPORTING ON DATA



# Measuring your indicators

1. Choose measurement method
2. Identify and select data sources
3. Think about how you are going to communicate and use your data

Results Framework	Typical measurement method	Typical frequency	How Used
Goal	If goal is monitored (most are not), draw data from existing sources, e.g., American Community Survey	Depends, but would have a multi-year timeframe	Broad community communication, usually with other stakeholders working towards the same/similar aim
Strategic Objective	Primary methods or secondary data source; are compared with the corresponding baseline findings	At end of project/program	To evaluate program effectiveness; should be shared with donors and participants
Intermediate Result	Data collected by project	Monitoring begins soon after outputs have begun to be delivered and can be expected to start taking effect	By project leadership to inform program adjustments, decision-making
Output	Collected as part of routine project monitoring, e.g., pre-/post-training scores, calculations of food distributed, etc.	Quarterly	By project management to monitor effective, timely, quality delivery of project activities; used to adjust activities as needed to improve implementation
Activity	Collected as part of regular activities, e.g., checklists, participant lists, intake forms	Daily, Weekly, or Monthly	By project staff to make sure activity implementation is on track



## Example

Let's say I am measuring an intermediate result/outcome indicator:  
*Participants use 80% of the food in their food basket within their own household by the end of the month.*

1. Choose measurement method, such as
  - End-of-month survey (e.g., SurveyMonkey)
  - Question asked at next pick-up
2. Identify and select data sources
  - Every client? Sample?
3. Think about how you are going to communicate and use your data
  - Review trends quarterly with leadership team?






## LEARNING ACTIVITY 2

As a small group, look at this result/outcome indicator:

% of children in targeted households with 75% or higher attendance at 5-star childcare. Discuss:

- 1) How could you plan to measure this indicator?
- 2) How frequently?
- 3) How would you plan to you use the data?
- 4) What challenges do you foresee in data collection, analysis and use?



# CHECK-IN / QUESTIONS



**PULLING IT ALL TOGETHER**

# PERFORMANCE INDICATORS (FOR CHAPEL HILL AND CARRBORO APPLICANTS)

<b>Strategic Objective 1</b> (please choose one from the Results Framework)	<input type="checkbox"/> Children improve their educational outcomes			
	<input type="checkbox"/> Residents Increase their livelihood security			
	<input checked="" type="checkbox"/> Residents improve their health outcomes			
<b>Intermediate Result</b> (please choose one from the Results Framework)	<b>IR3.2: Residents demonstrate new healthy lifestyle behaviors</b>			
<b>RESULTS</b>	Actual 2017-18	Estimated 2018-19	Projected 2019-20	
<b>Performance Indicators</b> (Please choose at least one performance indicator to report on from the Results Framework, and add additional performance indicators that you would like to report to the Towns. Please insert additional rows as needed, listing one per row).	# of parents that engage their kids in recreational activities they organize at home	0	0	100

# FOR ORANGE COUNTY APPLICANTS

	Program/ Activity	Performance Measurement	BOCC Goals and Priorities	Quantifiable Objective	FY 2018-19 Actual Outcome (Numerical)	FY 2019-20 Estimated Outcome (Numerical)	FY 20-21 Projected Outcome (Numerical)
1	Parent Education	# of parents that engage their kids in recreational activities they organize at home	Ensure a high quality of life and lifelong learning that champions diversity, education at all levels, libraries, parks, recreation, and animal welfare	Increase the # of youth ages 12 -14 who replace screen time with physical activity	0	0	100
2				Residents demonstrate new healthy lifestyle behaviors			

# REVIEW: WHICH IS WHICH?

Food Deliveries

**Activity (Output)**

Delivery Truck

**Resources (Inputs)**

End Hunger

**Ultimate Goal  
(Outcome)**

Greater access to food for  
single mom

**Strategic Objective  
(Outcome)**

# of deliveries per week

**Performance Indicator**


Single mom in the program  
receive food delivery each week

**Intermediate Results  
(Outcome)**



## GUIDED ACTIVITY

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# CHECK-IN / QUESTIONS





## **CLOSING & ANNOUNCEMENTS**



## REVIEW

In the chat: What is one learning you will take away from today and share with a colleague in your organization?

***Town and County to share contact info***

