Module Nine: Measuring for Success

Session Design

Using the Workbook

The participant workbook contains worksheets designed to assist participants in planning their economic development effort.

This session contains three handouts.
Worksheet One: Measurement Plan Template
Worksheet Two: Measurement Plan Example
Worksheet Three: Commonly Used Metrics

Session Introduction

Time: Approximately 25 minutes
Workbook Pages:
Slides: 1-6
Objectives: To set the stage for discussing evaluation in a positive light.

Many people are uncomfortable or just plain dislike dealing with evaluation. This introduction is intended to highlight some of the benefits of evaluating/measuring.

Slide: 1

Time: 15+ Minutes

Have this slide showing as people enter the meeting room

Instructions:

Have this slide showing when participants enter the meeting room. This is the last session to the SET series and is designed to set the final piece in place in order to launch your team's regional initiatives.

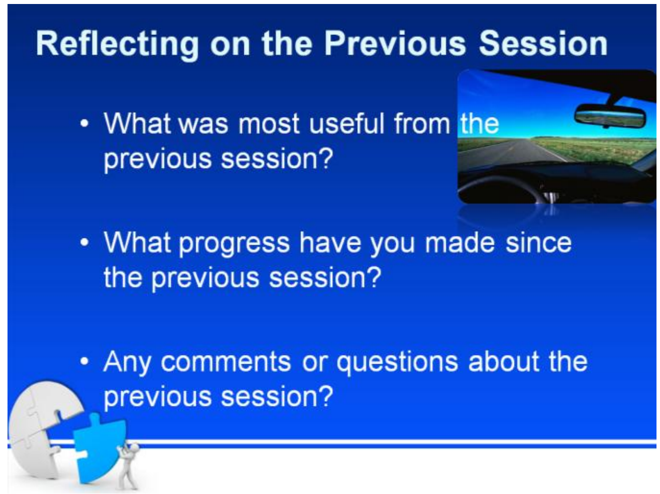
Script:

"Welcome to the final session of the SET training. We have explored a variety of different topics and provided you with a good mix tools for moving your regional efforts forward over the course of the last several weeks. Our intent in this last SET module is to put the final building block in place. After this session, you're going to have a solid foundation upon which to launch your initiative. Specifically, we'll be exploring 'Measuring for Success.' Notice that we are not just 'measuring success.' In addition, we will be looking at how we can use measuring to help us reach success – Measuring FOR Success."

Slide: 2

Time: 5 Minutes

Activity: Q & A in small group or as a class



Instructions:

Take some time to make sure the participants recall the key points from the last session. This is an important activity because it gives each participant an opportunity to clarify anything that didn't make sense. You can facilitate this discussion in whatever way seems most appropriate for the group. It is particularly important that the Planning Chart(s) and Plan(s) of Work from Module Eight have been completed by the group in order to move successfully through the material in Module Nine. Ideally, they will have completed one set of documents for each goal (Planning Chart and Plan of Work). If not, they at least need one completed set for one goal before beginning this session.

Script:

"Before we get started talking about the topic of our session today, let's take a few minutes to reflect on what you felt were some valuable insights you gained from our last session, things that might still be a bit fuzzy or unclear from Module Eight, and any important activities you completed since we last met. Please share your thoughts regarding any of the questions we have outlined n this slide."

Slide: 3

Time: 1 Minute

Instructions:

The finishing touches on a good planning process are to design a measurement process to ensure success. This session focuses on the key elements of putting in place a good measurement plan.

Script:

"By this point, we have spent a lot of time discussing strategies and key steps that will promote regional economic success. In this session, we will put in place a solid plan to help guide our success. Here is the outline of what we'll be covering in this module:

- Exploring the Value of Measuring
- Deciding What to Measure
- Using Measures to Promote Success
- Tracking Appropriate Measures
- Creating a Regional Plan for Measuring Success"

Slide: 4

Time: 10 Minutes

Instructions:

It's not unusual for people to have some pretty negative things to say when it comes to the topic of measurement or evaluation. The first item on the slide provides an opportunity for participants to share some of their own experiences (good and bad) when it comes to the things they try to measure or evaluate in their own organization. The second question is intended to get a sense of what participants seek to gain or learn from their monitoring or evaluation activities. It does offer you some idea of what kinds of experiences the participants have had, if any, with evaluation.

Lead the group in the discussion of the questions outlined on this slide. You can do this in small groups, in pairs, or as a large group. Try to vary how you approach discussions so that many of the participants are provided an opportunity to share their experiences with individuals who are part of the regional group.

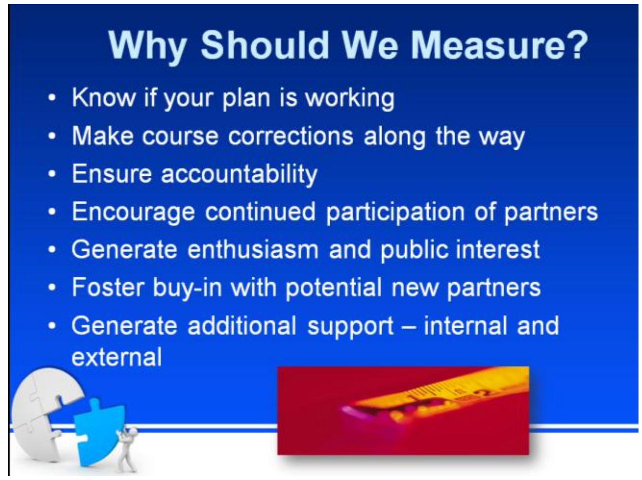
Script:

"Let's take stock of where we are in the things our respective organizations currently monitor or measure. On a blank piece of paper, jot down the things that your organization monitors or measures on a regular basis. Beside each one, consider what you learn from each measure. [Allow a few minutes for reflection.]

In small groups (or pairs), share your list. [Allow a few minutes for sharing responses as a small group/pairs.]

What common themes are you hearing from this discussion?"

Slide: 5 **Time:** 2 Minutes



Instructions:

Guide participants through a discussion of why measuring is important. Help them to surface reasons why this process is valuable and worth doing.

Script:

"In today's world, you probably all measure something in your work setting. But let's consider for a minute some of the reasons we may want to measure. Here are a few to get us started:

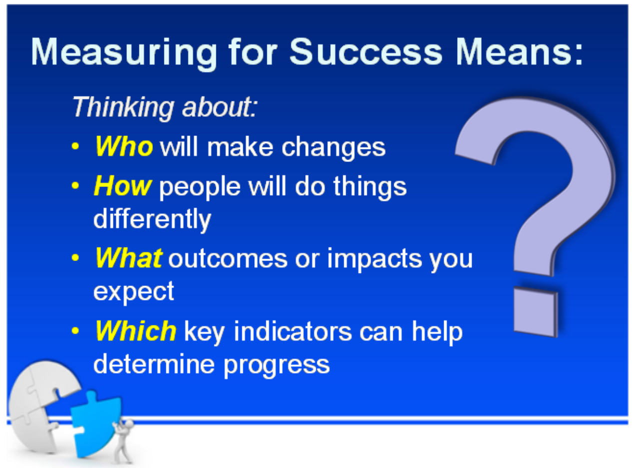
Measuring can help us accomplish a number of important objectives:

- Know if your plan is working
- Make course corrections along the way
- Ensure accountability
- Encourage continued participation of partners
- Generate enthusiasm and public interest
- Foster buy-in with potential new partners
- Generate additional support – internal and external (by internal, we mean the people who are already part of our regional team; by external, we mean people, communities, and organizations that are not yet on-board, or that exist outside of your region, who may want to invest in the work of your regional team once they see the valuable work being planned by your team).

What other items would you add to our list of why we should take the time to measure?"

Slide: 6

Time: 2 Minutes



Instructions:

This slide helps participants begin to hone in on the key factors of measuring in meaningful ways to promote success.

Script:

"There are several core items on which we want to focus as we seek to find the right path for measuring for success. We want to make clear from the outset that it's not necessary to measure everything, but thinking through these key questions will be very useful (refer to slide).

<u>Measuring for Success Means Thinking about:</u>

- ***Who*** will make changes because of what you have accomplished? In Module 8, we referred to these people as our target audience or participants.
- ***How*** will people (or groups) do things differently and what impact will the changes mean for them and the region? We identified the ABCs of success in Module Eight. These serve as the key foundational elements for the changes we seek.
- ***What*** outcomes or impacts will your plan be designed to achieve? What do you really hope will change over time as you move forward through your initiative?
- ***Which*** key indicators can help determine whether your plan is succeeding? How do we measure these elements in a way that can help guide success?
-

We will explore these and other questions as we move through this session."

Deciding What to Measure

Time: Approximately 10 minutes
Workbook Pages:
Slides: 7-10
Objectives:

General Notes for this Module
This section refers back to the elements of the planning model used in Module Eight. It serves as a quick reminder of the differences in outputs and outcomes and begins a discussion of measuring both.

Slide: 7

Time: 1 Minute

Instructions:

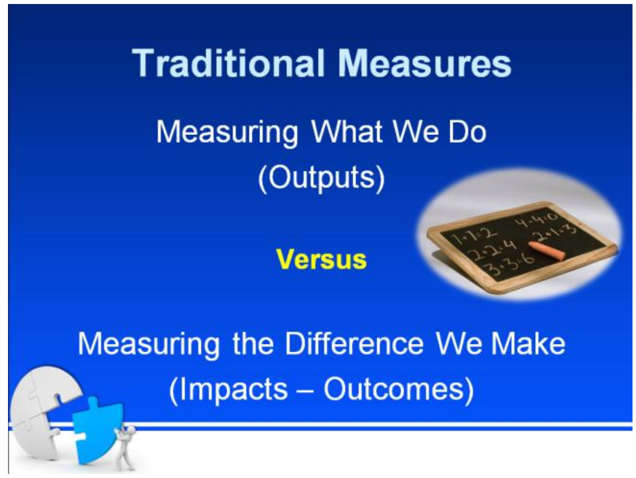
This section will lead participants through a short reminder of Module Eight's key terms and concepts to prepare them to identify complementary measures.

Script:

"With all of the variety of possible measures available, one of the first challenges is to decide what to measure. With any project or initiative, there are many options. But trying to measure everything will be cumbersome at best and frankly, just plain impossible to do. So, let's begin to think about what is important."

Slide: 8

Time: 2 minutes



Instructions:

The following slides build on the process that took place during "Module Eight: Planning for Success." Participants will use what they developed during that session to build their measuring plan in this session.

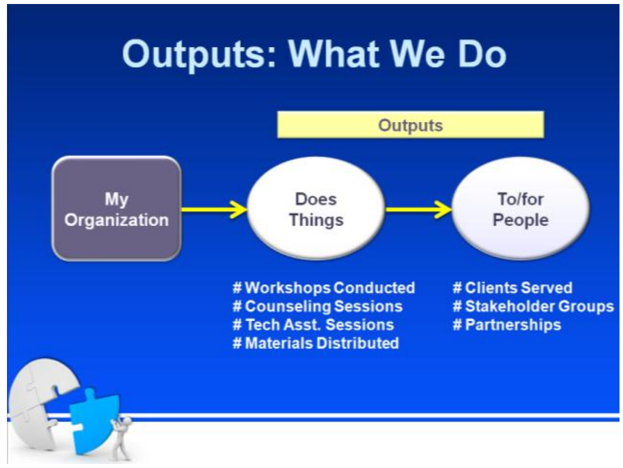
Script:

"We talked at the beginning of this session about what you already measure. Most organizations tend to focus on outputs, which you may remember, refers to the things your organization does (strategies) and the participants you reach as part of those strategies (clients served, etc.) Usually, less time and effort is focused on measuring the real impact or outcomes of our efforts.

However, measuring what we do (outputs) is not the same thing as measuring the difference we make (outcomes). When an organization only measures what they are doing (i.e. number of workshops held, number of clients assisted, etc.), and pays scant attention to the real difference they are making over time (true impacts), then that organization is missing an opportunity to measure real success. We spend a good bit of time in Module Eight (Planning for Success) identifying the outputs and outcomes of your regional team's activities. Now, it is time to consider how we can use these to make sure we stay on the path to success."

Slide: 9

Time: 5 Minutes



Instructions:

The next few slides are designed to help participants begin to separate the measuring of "outputs" from that of "outcomes." While both are important, we too often focus on outputs and tend to neglect outcomes. We want to make sure participants have a good grasp of each of these concepts, and want to be sure they realize the importance of measuring both.

Script:

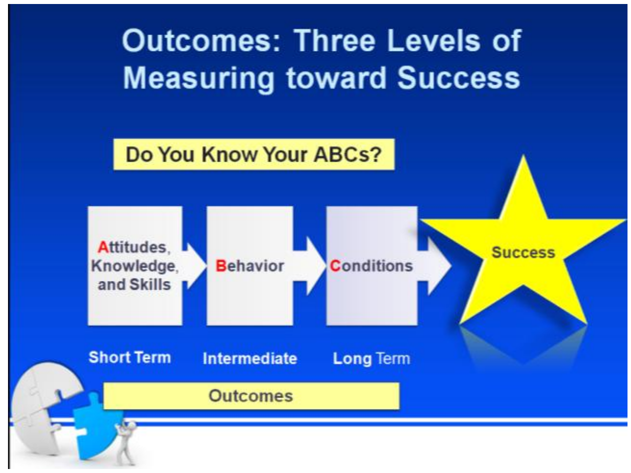
"To be honest, most organizations pretty much try to focus on measuring things that they do directly. These include both what we do and to whom/for whom these things are being targeted. For instance, we may conduct two workshops for 15 clients who are thinking about opening a small business. By counting both the number of workshops delivered and the number of people taking part in these workshops, we have taken steps to document our outputs.

Look back at the list you made earlier of the things that your organization measures. Which of these are outputs, or measures of either things that you do directly or measures of the numbers of participants/clients you serve?

Now, do these measures give you any inkling of whether you've made a real difference over time? Probably not. For that, we need to dig deeper."

Slide: 10

Time: 2 Minutes



Instructions:

Participants will review the ABCs (outcomes) they identified in Module Eight so that they can prepare to design a measuring process that takes these components into account. Use this time to review the pieces the group identified from that session. If the amount of time between Module Eight and Nine is short, you may be able to go through this quickly. If, however, it has been a longer period of time, you may want to take a few more minutes here to make sure all participants understand the terms. It will serve as a quick refresher of the ABC framework.

Script:

"In Module Eight, you identified the ABCs for your initiative. These three elements are key to measuring for success. As a quick review, you probably remember that there are three types of outcomes on which we can focus:

A: Short Term Outcomes – usually involve changes in Attitudes, knowledge and skills
B: Intermediate Outcomes – usually involves changes in Behaviors
C: Long Term Outcomes – broader changes in the overall Condition of a person, group, community or region.

Thinking of them as the ABCs of success is a nice simple way to think of what we need to measure as we seek to move forward with our regional plans. Remember that all three are vital to reaching success, and measuring each provides an opportunity for us to make some course corrections along the way. We're going to show you how this works in the next series of slides."

Using ABCs to Promote Success

Time: Approximately 35 minutes
Workbook Pages:
Slides: 11-18
Objectives:

This section will help participants see how to use the different layers of measurement to help keep the strategy on target. Participants will walk through an example that will have them consider different points along a continuum that may indicate a needed course correction in a strategy. They will see how appropriate measures help identify those crucial points of correction to ensure both timely and efficient adjustments.

Slide: 11

Time: 1 Minute

Instructions:

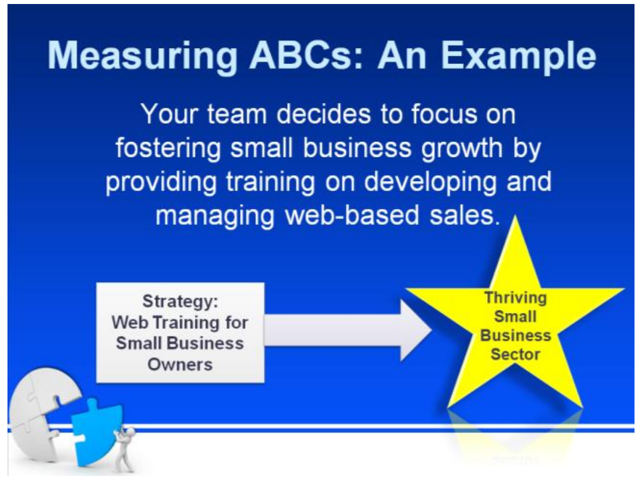
During this section, participants are guided through a discovery of how appropriate measurements can actually provide opportunities for making course corrections that may be necessary along the way.

Script:

"Let's delve into the ABCs a bit more so that we can discover how we can really improve our chances of achieving success with regard to our regional goals and strategies."

Slide: 12

Time: 1 Minute



Instructions:

The next few slides are designed to walk participants through an example that helps make the case of the value of embracing a comprehensive approach – one that measures both outcomes and outputs.

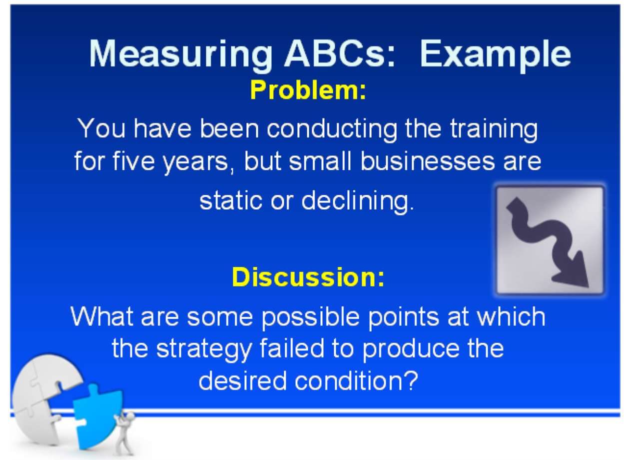
Script:

"Let's turn to a straightforward example of how we can measure in ways that can help us promote success.

Suppose that your Regional Economic Development Team decides that it wants to implement a training program that will help small business owners build and manage a website (strategy) that will increase their sales. By doing so, your team is hopeful that this will be a good way to strengthen the vitality of the small business sector in the region (overall goal). But wait . . . There's a problem here!"[Go to the next slide]

Slide: 13

Time: 5 Minutes



Instructions:

This slide sets up the scenario where a strategy has been implemented over time with no apparent success.

Script:

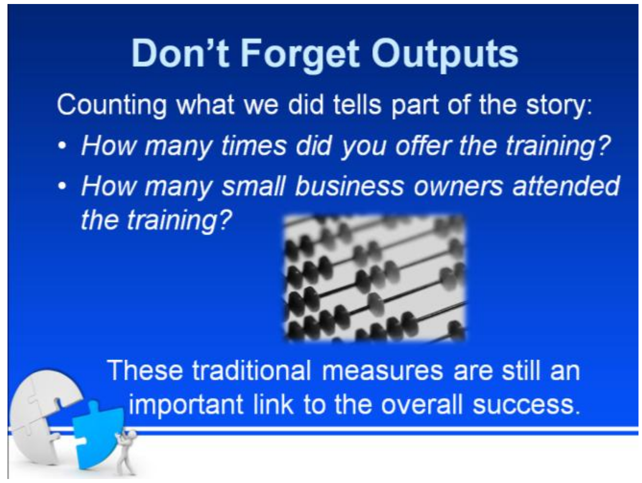
"Here's the problem: Imagine that your team has been conducting this training for five years now, but when you look around, you realize that the number of small businesses in your region is either static, or worse….declining.

What are some possible places or points along the way where the strategy may have failed to produce the desired condition? What could have gone wrong and where? [Allow for responses.]

The reality is, that without measures in place along the way, we don't really know what went wrong. However, by putting measures or checkpoints in place, we can introduce some important course corrections to help improve our chances that our strategy will stay on track. Let's take a closer look at how this works."

Slide: 14

Time: 4 Minutes



Instructions:

Outputs are crucial since they help tell part of the story. Help participants realize the value of this type measure.

Script:

"As we noted at the beginning of this session, the most common practice that individuals or groups use when it comes to evaluation is to document outputs. Now, don't get me wrong; it's pretty important for us to do this since we need to show what outputs we produced as a result of our hard work. In other words, we want to measure and document what we did, how many times, and what groups or individuals took part in our activities.

For this example, we would want to take note of:

- How many times the training was offered;
- Who was able to take part in the training;
- Whether the training reached the intended audience. For example, how many small business owners attended the training?

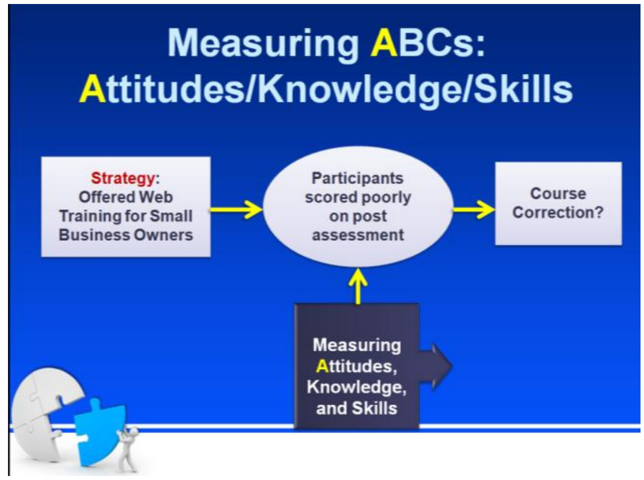
These numbers alone might guide us on some possible course corrections. For instance, if very few people took advantage of the training, or those who did were not the type of businesses we had hoped to attract, then what possible corrections do we need to consider? [Allow for responses.]"

<u>Possible answers</u>:

- Change advertising strategy
- Change when the training is offered
- Change the training format
- Do personal appeals to the small businesses we want to reach
- Other ideas . . .

Slide: 15

Time: 5 Minutes



Instructions:

Begin walking participants through the elements of outcomes to see how measuring success at each step can help introduce some course corrections before it's too late.

Script:

"But let's pretend, now, that you have held the training several times each year and had great participation from small business owners. However, you still aren't seeing the small business growth you hoped. How can we explore possible causes and chart course corrections?

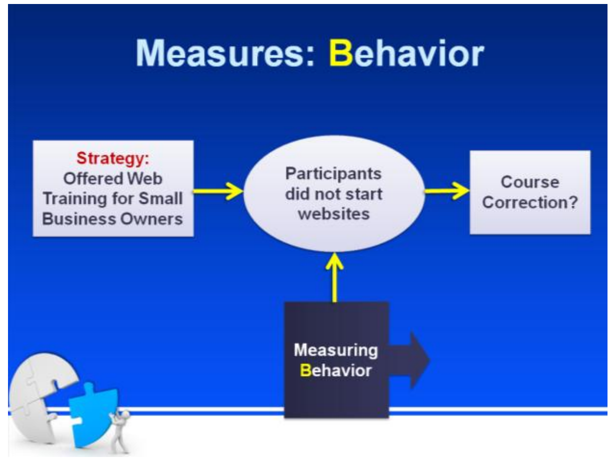
The next step is to consider *Short Term Outcomes*: Measuring **attitudes/knowledge/skills**.

In our example, suppose you developed some type of measure to assess the attitudes/knowledge/skills gained by participants taking part in the training. But participants scored poorly on the assessment, indicating little or no changes in attitudes, knowledge, or skill. What course corrections would you consider making given these results?"

[Invite the participants to offer responses to this question.]

Slide: 16

Time: 5 Minutes



Instructions:

Walk participants through this next example, one that focuses on an intermediate (behavior) outcome measure.

Script:

"Now, suppose that students performed well on the post-assessment, but did not create any websites (the behavior you hoped would happen). What are some possible issues or problems that we might need to address? [Allow for responses.]

Possible issues/problems:

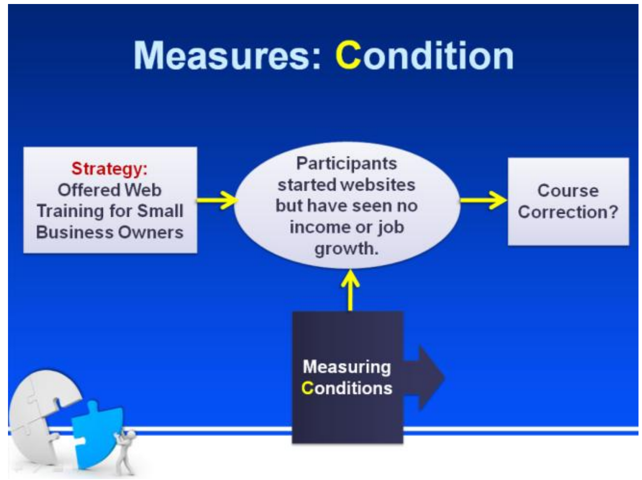
- They have no or limited access to high speed broadband service
- They don't own or have access to computers
- The training workshop did not fully prepare them to begin developing and launching their sites
- They were concerned about the cost of building and managing a website

What are some possible course corrections at this point? How would you try to determine what course correction is needed?"

[Get the group to discuss these questions.]

Slide: 17

Time: 5 Minutes



Instructions:

Conditions (long term outcomes) are considered in this slide. These tend to be the most difficult to measure and thus, are often omitted in evaluation activities. However, they are an essential component of any effort to determine how well the team is doing in terms of achieving their goals and priorities, or in delineating the types of adjustments that may be needed if they hope to improve or rectify certain conditions in the region.

Script:

"Now, consider one more possible correction point. Suppose that participants in your training course complete the sessions and all have developed and launched websites. However, none of the businesses have seen any income or job growth as a result of having these websites online. What may be some of the reasons behind this unfortunate situation?

[Again, encourage discussion among participants]

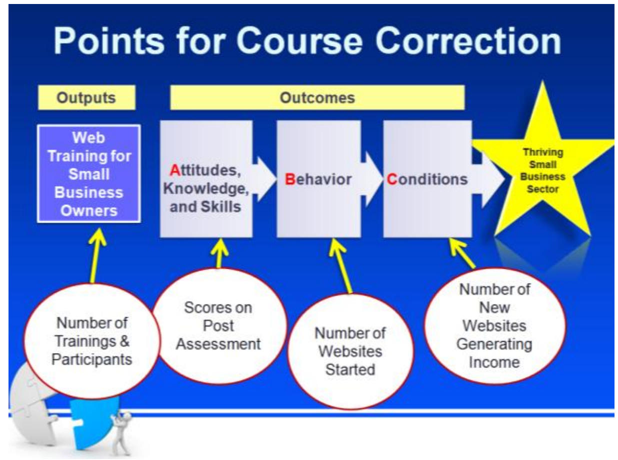
Possible answers:

- Websites are not 'customer friendly'
- Websites are not well linked or marketed
- Product or services being marketed may be unclear or not very compelling
- Could be due to outside conditions – i.e. economic downturn
- Websites are not updated/maintained regularly
- Other ideas?

What are some possible course corrections that could be made?" [Allow for discussion.]

Slide: 18

Time: 5 Minutes



Instructions:

This slide assembles all of the check points that can help re-direct or refine a strategy that can ultimately help the team achieve success (that is, its goals).

Script:

"By measuring both outputs and outcomes across the ABCs, we're able to identify and incorporate corrections along the way, thus improving the prospects of reaching the success (or goal) we had hoped to achieve. If we simply begin implementing a strategy and pay no attention to the path we are taking, then we'll have a tough time determining when or where needed changes should be made."

Tracking Appropriate Measures

Time: Approximately 20 minutes
Workbook Pages: Handout One
Slides: 19-24
Objectives:

Now that participants have identified what to measure, they will begin to consider how to measure. In order to ensure that outcomes identified are achieved, the participants will need to be able to identify a way to measure them that is manageable.

Slide: 19

Time: 1 Minute

Instructions:

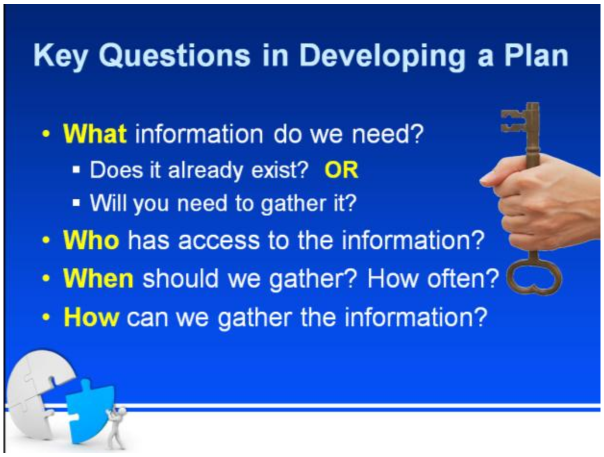
The next series of slides (Slides 20-24) will provide participants some additional guidance on the variety of approaches to consider for measuring the different types of outcomes (short, intermediate, and long-term).

Script:

"We want to devote the next series of slides (Slides 20-24) to exploring methods that can be used to collect the type of information that you'll need to help document the outcomes of your efforts."

Slide: 20

Time: 2 Minutes



Instructions

The items outlined on this slide describe some of the key questions the team should consider as it works to develop a good measurement plan.

Script:

“As you know, we identified strategies and outcomes (using the ABC format) in Module Eight. Now, we need to consider how we can gather meaningful measures of each of these key components. To develop a sound measurement plan, we need to consider the following questions:

What information do we need?

Does it already exist? If so, where and in what format? (Example: graduation rates, number of businesses that are members of a local business cooperative, etc.) **OR**

Do we need to develop a way to gather the critical information?

Who has access to the information we need? There may be an organization that has the information we need or knows of a way to secure the information. For example, schools or government agencies may have information on high school graduation rates, or dropout rates, etc. On the other hand, we may need to gather the information we need because it does not presently exist.

When should we gather the information? How often? There is no right answer to this. It pretty much depends on the type of project you are undertaking. However, it’s pretty standard to gather information ‘before and after’ your program or project so that you can measure the nature and level of changes in the audience you are targeting. Of course, as we’ve noted before, it’s a good idea to do some checking at different points in your project/program along the way so that needed modifications can be made in your plan.

How can we gather the information? Consider methods that are reasonable, manageable, and cost-effective for both you and your participants. We’ll look at this in more detail in the next few slides.”

Slide: 21

Time: 2 Minutes

Workbook: Worksheet One

Instructions:
This slide provides a quick overview of some of the basics when it comes to measuring. Your group can quickly become overwhelmed if it tries to measure everything. Help them understand that' what is important is to develop a measurement plan that is manageable (not too ambitious), meaningful in that the team is trying to collect information on core elements of their program or project, and achievable given the human and fiscal resources that the team has available.

Script:

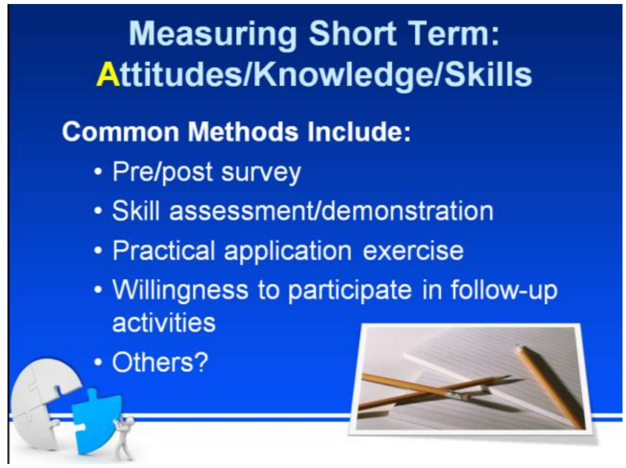
"Here are some quick guides for choosing your measures. First, keep in mind that it is not essential to measure everything you can possibly link to the initiative. We need to carefully choose what we need to measure, so it may be helpful to consider the following guidelines:

- Be reasonable about what you can manage. Sometimes it is easy to be tempted to measure everything. But measuring takes time. It is better to measure a few things well than a lot of things poorly.
- Be thoughtful about measuring things that are really meaningful. Don't measure just to be measuring. Ask yourself, 'What will I really learn from this?'
- Be realistic. Focus in on an indicator that may realistically show a difference. For instance, you aren't likely to end world poverty in five years. But you may be able to reduce the number of households in your target region that have their utilities turned off for non-payment. While both may be concerns, the latter one represents a problem that your team could realistically monitor and anticipate impacting through appropriate strategies.
- Be smart. Look for data that may have already been collected and that provide indicators of change you want to track. Explore the data that are already available for your target area/group. [This is a good time to refer back to Module Six.]

The participant's workbook contains a resource list of commonly used metrics."

Slide: 22

Time: 5 Minutes



Instructions:

The slide highlights some of the common methods that can be used to measure short-term outcomes.

Script:

"Let's look at a few examples of ways to measure each of the ABCs. We're going to start by looking at ways to measure short-term outcomes. Frankly, measuring short-term outcomes is usually the easiest to do because we are trying to capture changes in attitudes, knowledge, and/or skills on the part of those we've targeted as part of our program or project.

Here are some of the well-accepted methods for assessing short-term outcomes:

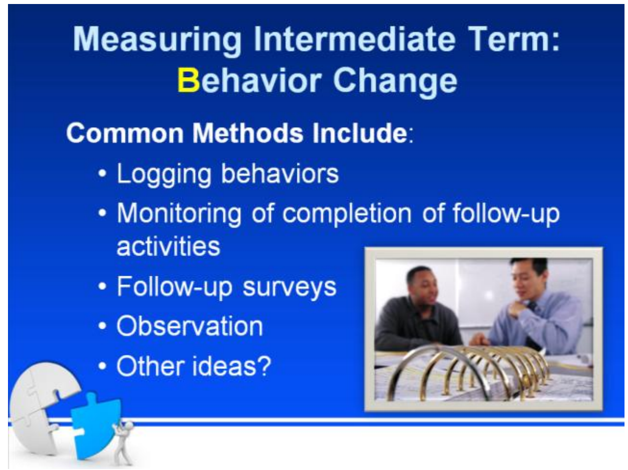
- Pre/post survey: A few key questions related to attitudes or knowledge can help you quickly assess a participant's change in these two areas.
- Skill assessment/demonstration: When teaching a skill, having participants demonstrate the skill is a great way to see if they have successfully mastered the skill.
- Practical application exercise: Applying key concepts or skills to a practical exercise is another way to check understanding. For instance, in Module Eight, you developed a planning chart that was a practical use of the information you learned during that session.
- Willingness to participate in follow-up activities: Sometimes a participant's willingness to participate in follow-up activities can be an important gauge. For instance, if you conduct an introductory session on an important topic and participants sign up for the follow-up session, you have some indication of interest. This could be an indirect way to determine that the information you presented in your initial session was effective since it spurred individuals to sign up for the next session of your program.

What are some other viable methods, in your view? [Allow for discussion]

What are some of the positive aspects of these different approaches? What are some of the challenges or limitations associated with these different information gathering strategies?" [Allow for discussion]

Slide: 23

Time: 5 Minutes



Instructions:

You'll now focus on the evaluation methods that are designed to measure changes in behavior on the part of your target audiences.

Script:

"As we move further along on the 'outcomes' continuum, that is, from short – to intermediate outcomes, we have to consider a different set of methods in order to document changes in behavior.

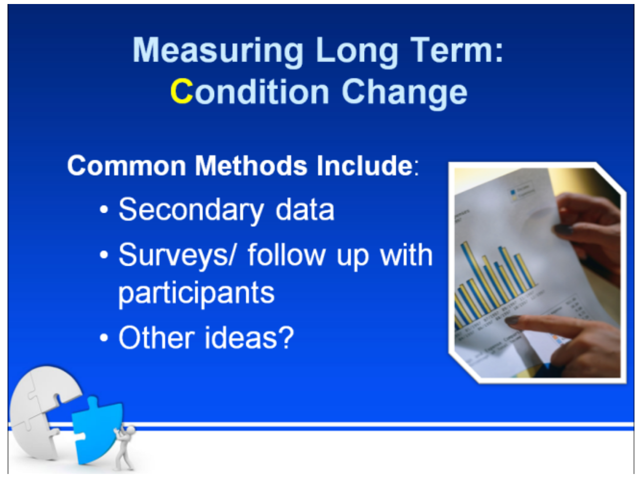
Some common methods for measuring intermediate (behavior) changes include:

- Logging behaviors: This works well for participants that you'll be working with for an extended period of time. You can provide a way for them to monitor a specific behavior, such as using a log or tally worksheet. Suppose, for example, your strategy is to develop a program for high school seniors with the goal of increasing college entrance rates. One of the behaviors you want to increase along the way is the number of times a senior visits a college campus to explore enrollment options. This could easily be tracked by asking the student to log visits (i.e. dates, purpose, etc.). Or you may want to track the number of hours they are spending studying each week by subject.
- Monitoring of completion of follow-up activities: Similar to logging behaviors, this method provides participants with a list of activities to complete along the way. Periodic checks with the participants can let you know whether or not your strategy is leading to the behavior you are seeking.
- Follow-up Surveys: We've all received a survey in the mail or in our email box asking us for input after an event or experience of some kind. These can be useful tools in finding out if the strategy you selected is leading to change.
- Observation: Sometimes observation is a good behavior measurement tool. Suppose your regional strategy involved helping participants identify five important changes they each needed to make to their business websites. A quick click of a mouse could tell you in a matter of minutes whether or not the participants went back to their shops and put the learning into behavior. Or, if you've provided hospitality training to main street businesses in your town, you could try to periodically visit these stores to see if the principles of good hospitality are being practiced by the shop owners/employees.

What are some other ideas you have for measuring behavior changes?"

Slide: 24

Time: 5 Minutes



Instructions:

This is the final slide you'll review with the participants before they begin working on their own plans. The third component of "outcomes" deals with "conditions." This is, without question, the hardest dimension to measure appropriately. At the same time, is the most crucial aspect of any measurement plan since it's the one that you most hope to change in the target group – be it people, businesses, communities, or the region.

Script:

Long-term changes require some well-thought-out planning. Typically, it is the hardest to measure, but in many ways, the most meaningful. You see, if I adopt a strategy that changes the attitudes/knowledge/skills (short term outcomes) and the behaviors (intermediate outcomes), but fail to make any dent in the condition I am hoping to change, then I've missed the mark. It is tempting, though, to skip this step because of the extra challenges that the measuring of long-term outcomes entail. However, there are well-accepted ways to measure conditions that are doable on the part of your team. Here are some common methods for tracking long-term outcomes:

- Secondary data: As was noted in Module Six, secondary data are those that already exist, such as Census Data or data generated by various local and state agencies. In some cases, these types of data can, by themselves, offer you a way to measure changes in conditions (such as increases in the number of people employed or improvements in local sales tax collections). A word of caution, though, is to make sure you are looking at data that are realistically tied to your strategy.

For instance, assume that your team launched a program to reduce high school dropout rates by $1/4^{th}$ in five years in your region. Thanks to the annual data reported by each school district in your region, dropout data is published every year. These annual reports could allow you to monitor the progress being made in achieving your five-year goal. Certainly, you are going to want to track this information, but keep in mind that you have to make sure that the data are specifically on your region and that it includes the schools you are specifically targeting. Also, it may be tough to conclude that improvements in the high school dropout rate are due to your team's efforts. It's important to find out what other efforts have been launched in the school by teachers or by the school board to help tackle the dropout problem. If others have been addressing this issue as well, you can at least argue that your team's efforts – along with those of others in the region – have helped bring down the high school dropout rate.

- Surveys/ follow up with participants: Like measuring behavior changes, surveys or other methods of following up with participants can help note changes in their conditions. It's not unusual when drug companies or hospitals undertake clinical trial studies, for example, that they provide information and education in hopes of improving the patient's knowledge and attitudes. Then, they try to see if the person has changed his/her behavior in a manner that leads to better health. Then they may introduce certain drug prescriptions to see how well that addresses a physical condition that the patient may be experiencing. What you'll often find is that they'll keep tracking the patient over a number of months or years so that they can determine the long-term effects of the drug on the person's overall health. This is called a longitudinal study. As you can see, the word 'long" is part of the word 'longitudinal' because it's a long-term endeavor.

For your information, there are a couple of ways to do longitudinal studies that might be sense for your team to consider. The first is a panel study. The panel study: involves the selection of a good cross-section of people being targeted by your program or project. In the case of your team's efforts to reduce high school dropout rates in the region, you could do a panel study that involves a sample of high school students (and/or parents, teachers, administrators) and gather information from them at multiple times over the course of many years to determine the impact of your program/project on dropout reduction.

A second option is a cohort study. In this case, you focus on a subset of the population you are targeting. In the case of the high school dropout situation, you could decide to focus only on incoming high school freshman and try to focus your program/project exclusively on these individuals. You can then track their high school performance over the course of their four years in high school. In this type of study, the 9th graders are considered a 'cohort.'

What are some other ideas? [Allow for discussion.]

Creating a Regional Plan to Measure for Success

Time: Approximately 90 minutes
Workbook Pages: Handouts One, Two, and Three
Slides: 25-37
Objectives:

This final section is intended to provide "hands-on" practice at creating a measurement plan. Using the logic model developed in Module Eight as the pieces to measure, Handout One will be used as a guide for helping participants write the plan. Handout Two is an example of a completed plan. Handout Three has a list of commonly used metrics.

Slide: 25

Time: 1 Minute

Workbook: Worksheet Two & Worksheet Three

Instructions:

With the majority of the content we want to share in this Module now completed, we want participants to begin developing their own "Measurement Plans." A template is provided (Handout Two – Measurement Plan) as well as an example of a completed plan (Handout Three – Measurement Plan Example). Teams should initially complete a plan for each of their defined goal, but then they will want to compare across these goals to see if there are any overlaps in what they are proposing to do. Move around as the group works and listen to the discussion. Some outcomes are easy to measure, while others are very challenging. Help the group consider options that are manageable, yet meaningful.

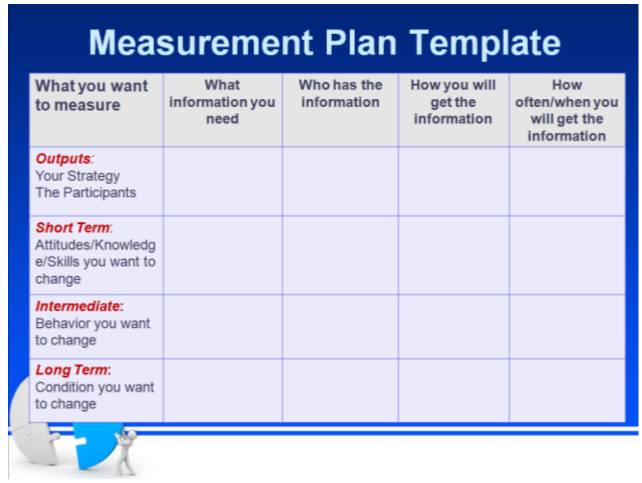
Script:

"Now that we discussed some of the basic strategies for building a good measurement plan, it's time for your team to work on the development of a measurement plan that aligns with the major goals that you've embraced as a regional team. That is, we want you to build a plan that details the specific types of measures you going to use to document the short, intermediate and long-terms outcomes associated with each of your goals."

Slide: 26

Time: 2 Minutes

Workbook: Worksheet Two & Worksheet Three



Instructions:

Introduce the Measurement Plan Template (Handout Two) and go over the elements.

Script:

“Here is a simple ‘Measurement Plan Template’ that offers a useful guide to help you think through the various elements that need to be incorporated into your plan. It includes space for you to write in your identified outputs and outcomes in the far left-hand column under the heading, ‘What you want to measure.’

For each item you want to measure (for example, outputs, short-term outcomes), you’re going to specify the following:

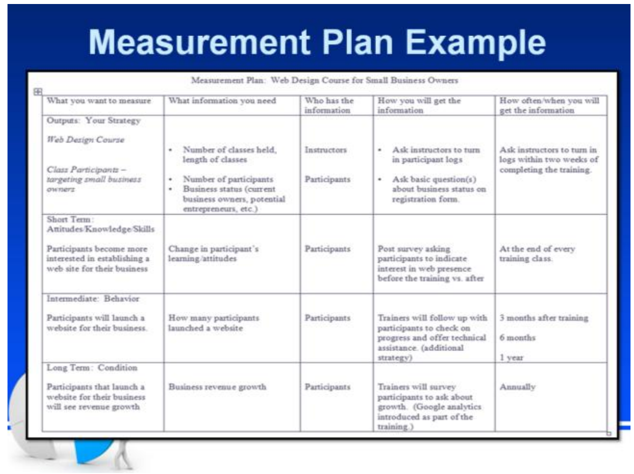
- What information you need?
- Who has access to the information?
- How you will gain access to the information?
- How often/when you will gather the information?

Let’s look at a quick example to get us started.” [Next slide]

Slide: 27

Time: 10 Minutes

Workbook: Worksheet Two & Worksheet Three



What you want to measure	What information you need	Who has the information	How you will get the information	How often/when you will get the information
Outputs: Your Strategy *Web Design Course* *Class Participants – targeting small business owners*	• Number of classes held, length of classes • Number of participants • Business status (current business owners, potential entrepreneurs, etc.)	Instructors Participants	• Ask instructors to turn in participant logs • Ask basic question(s) about business status on registration form.	Ask instructors to turn in logs within two weeks of completing the training.
Short Term: Attitudes/Knowledge/Skills Participants become more interested in establishing a web site for their business	Change in participant's learning/attitudes	Participants	Post survey asking participants to indicate interest in web presence before the training vs. after	At the end of every training class.
Intermediate: Behavior Participants will launch a website for their business.	How many participants launched a website	Participants	Trainers will follow up with participants to check on progress and offer technical assistance. (additional strategy)	3 months after training 6 months 1 year
Long Term: Condition Participants that launch a website for their business will see revenue growth	Business revenue growth	Participants	Trainers will survey participants to ask about growth. (Google analytics introduced as part of the training.)	Annually

Instructions:

This slide shows an example of a simple measurement plan based on the web-design example used earlier in this session. A full-page version of this chart is provided in the participant's workbook. Use this page to help participants grasp the end product they will be seeking for their own Measurement Plans.

Script:

"This slide presents an example of a simple measurement plan that we developed based on the web-design course we used as an example earlier in this session. You may wish to follow along by looking at 'Handout Three – Measurement Plan Example.'

You can see that for each of the outputs and outcomes we've specified for our web-based course, we have identified the measures we want to capture, the individuals/groups that we propose to tap to secure the information we need, how we plan to obtain that information, and when and how often we plan to gather the necessary information.

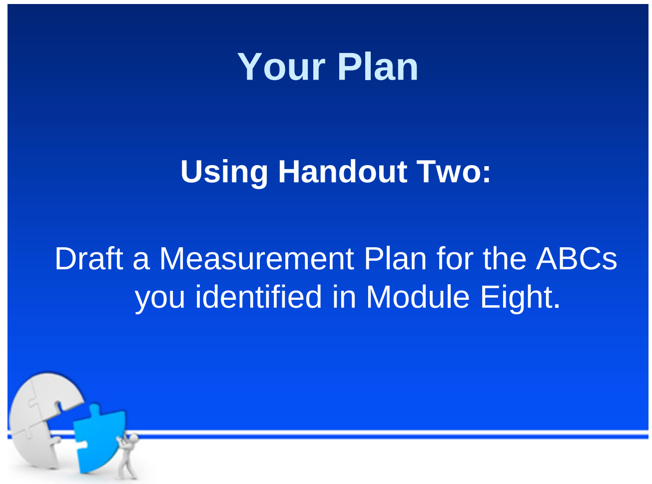
Sometimes, as you walk through this process, you may be able to actually identify additional supporting strategies or steps that may be needed to be incorporate into your Plan of Work. For instance, in this example, as we looked at behavior changes, we decided that we should include a check point at three months, six months, and one year during which we plan to conduct one-on-one visits with the web-based class participants and offer the person technical assistance resource if they are experiencing difficulty moving forward with their web-based activities. So, we need to add these new steps to our Plan of Work we completed in Module Eight.

Also, when we approached the 'Conditions' measure, we decided that we should add some instructions on of web measurement tools into the training we offer.

By developing our measurement plan at the front end – before even launching our web design course for small business owners in the region – we have been able to introduce some important adjustments already in our plan, corrections that are likely to improve our chances of meeting our goal."

Slide: 28

Time: 25 Minutes



Instructions:

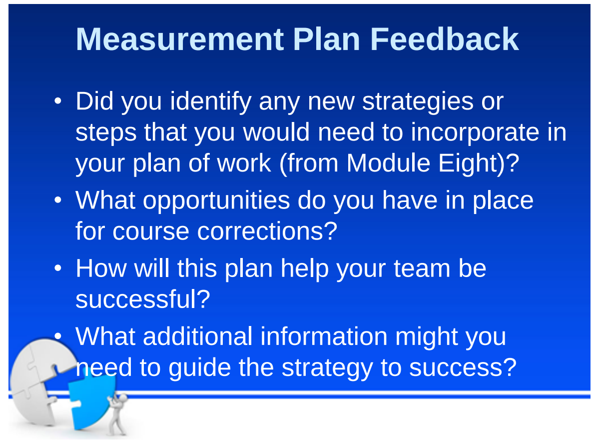
Allow time for participants to work in small groups or as one team as appropriate for the size of the group and the number of goals identified.

Script:

"Now we want to provide your team time to work on your measurement plan. Using the Planning Chart developed in Module Eight: Planning for Action, select at least one short-term (attitude/knowledge/skill), one intermediate (behavior) and one long-term (condition) to measure associated with each of your goals. Design a plan that identifies data needed, who has the information, how you will get access to the data, and how often you intend to measure. Be sure to include measures of outputs as well, the 'what you will do' part."

Slide: 29

Time: 15 Minutes



Instructions:

Use the questions on the slide as a guide to discuss and review the measurement plan process. Encourage participants to make note of any adjustments that they recommended be made in their plan of work as a result of going through the measurement plan. What new steps or strategies did they identify as a result of this group exercise?

Script:

"Let's take a few minutes to reflect on your team plan using the following questions as guides:

- Did you identify any new strategies or steps that need to be incorporated into your plan of work?
- What opportunities do you have in place for making course corrections along the way?
- How will this plan help your team be successful?
- What additional information might you need to guide the strategy to success?"

Slide: 30

Time: 5 Minutes

Instructions:

Since one of the purposes of this initiative is the development of the regional partnership itself, it is important to have the group consider how they will monitor and chart course corrections in terms of strengthening their connections with each other.

Script:

"One of the key elements of this initiative is to develop this regional partnership, one that cuts across traditional boundaries (such as the boundaries associated with a county or city). **YOU** are important! In order to successfully pursue regional work, your team needs resources in the form of people, money, facilities and other assets. These assets, or inputs, are the things that will help you get your team's regional efforts off the ground.

Without inputs, it's going to be tough to move forward with any of your plans. So, measuring matters here, too."

Slide: 31

Time: 1 Minute

Instructions:

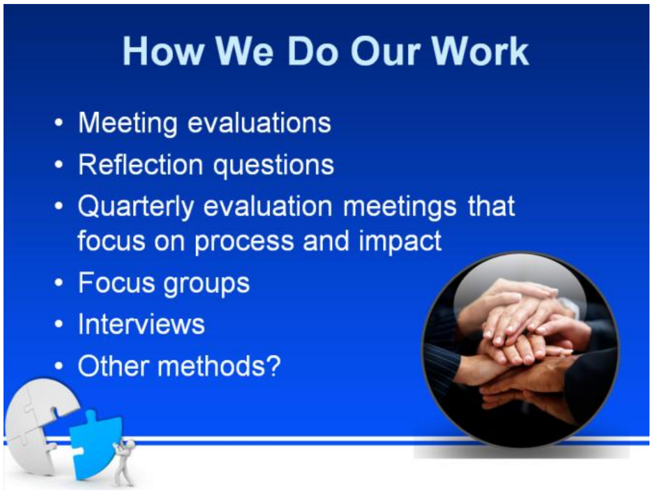
Since some of the partners in this regional approach will be working together for the first time, considering this element of how the partnership or team is working may be crucial to the success of the regional initiative.

Script:

"Measuring inputs takes on a different 'look' than more traditional measures. While it may involve some numbers, it is more about how we are doing as a team than just numbers. It involves thinking about the way we are working together and fine-tuning processes that will strengthen the partnership. Let's take a few minutes to consider some of these."

Slide: 32

Time: 1 Minute



Instructions:

This slide draws attention to some of the important ways that the partnership can gauge the "health" of its team. Ask the group to discuss these different avenues for assessing how well the group is working as a team. Ask for additional suggestions.

Script:

"Information on how well your team is working together can be collected using some pretty straightforward techniques. For instance, you can do a quick evaluation at the end of each meeting by asking for high points and suggestions for improvement. You can do a periodic short survey of your group. Some very successful organizations conduct quarterly evaluation meetings to review progress across all of the measures.

If some people are no longer attending the meetings of your team, contact them to find out why they have decided to stop attending team meetings. While some may have very legitimate reasons that have nothing to do with the team, there may be others who are unhappy with the way the team is operating. Our intent is to identify and correct problems with the functioning of the team before things get out of hand. or before the number of people attending the meeting becomes way too small to get anything done.

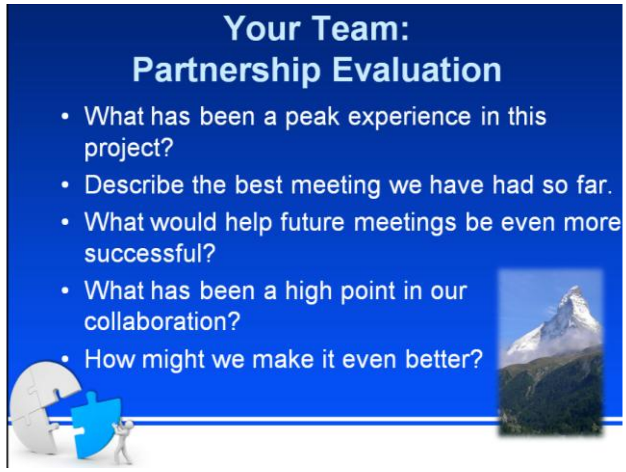
Some of the ways you can take the pulse of your regional team's health include:

- Completing meeting evaluations
- Using reflection questions to find out what is working/not working with the team
- Quarterly evaluation meetings that focus on how things are getting done and the impact we are having as a team
- Focus group sessions in which we deal with a small core of questions about the effectiveness of the regional team and how to make it stronger
- Interviews with a subset of team members and/or of people who have stopped taking part in the activities of the regional team

Can you think of other ways to determine if your regional group is working in positive and productive ways as a team?"

Slide: 33

Time: 5 Minutes



Instructions:

Lead the group through this "real time" process evaluation guide. Use these questions to guide them in a discussion of what has worked well so far in their partnership and what could be done to enhance the partnership. Use your own judgment on how to structure the discussion. For instance, you can divide the group and have them discuss the questions, reporting back after a few minutes. Or you can walk the entire group through the questions together. Try to get them to focus on specific changes the group can make to further improve the way they work as a regional team.

Script:

"Our slide provides an example of a partnership evaluation that can be used to help improve our efforts as a regional team. Since we have been meeting together for several sessions now, it is appropriate for us to consider how well we are doing so far as a team and how we can improve our team performance.

- What has been a peak (positive) experience for you being part of this regional team?
- Describe the best meeting we have had so far. What were the things that made it such a valuable experience?
- What would help future meetings be even more successful?
- What has been the high point in this regional partnership or collaboration?
- What have been some low points along the way and how might we improve?"

Slide: 34

Time: 10 Minutes

Instructions:

Partnership evaluation is an important part of measuring for success. Guide the group in thinking about how they will monitor and measure the team's health along the way. Discuss specific plans for implementing the measures identified.

Script:

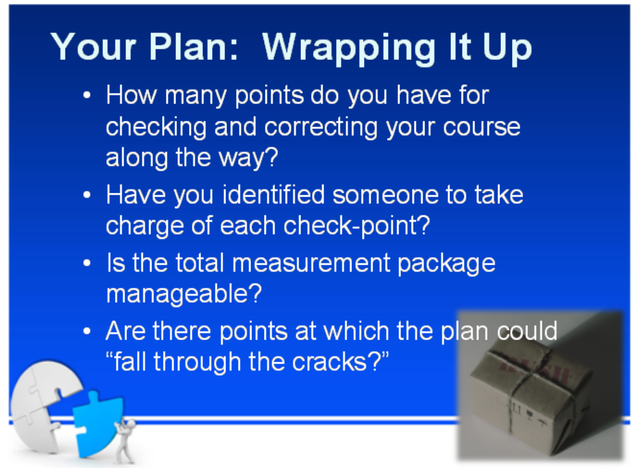
"Based on our discussion, let's take a few minutes to carefully consider how we can enhance this regional partnership.

- What plans can we put in place to ensure the viability of this partnership?
- What strategies will work best with this regional collaboration?

What steps do we need to include in the Plan of Work to ensure that this vital focus is not lost?"

Slide: 35

Time: 10 Minutes



Instructions:

This final slide is designed to get the group to step back from the detailed work they been developing. We want them to take one final look at the total measurement plan. The questions we have on the accompanying slide are designed to encourage the group to think about the total package.

Script:

“Now that we have the pieces of our measurement plan identified, let’s take a step back and take a careful look at the total package.

- How many points do you have for checking and making corrections along the way? Are there enough checks built into the entire time span of the project (without causing undue burden on the team)?
- Have you identified someone to take charge of each check-point? – At least one person should be identified to track each measure. Ideally, the task of measuring should be shared and reported back to the total group at regular intervals. Are there steps that need to be added to the Plan of Work developed in Module Eight now that you’ve developed your measurement plan?
- Taken as a whole, is the measurement package your team planned manageable? Looking at all of the pieces together, can the various measurement pieces be done in a successful manner? It is too ambitious or not ambitious enough?
- Are there points at which the plan could ‘fall through the cracks?’ Is there a balanced investment of time and attention given to each of the elements of the plan? Are there holes that could threaten the success of the initiative if not monitored?
- Do we have the right mix of resources to make the measurement plan a reality? Do we have the people, fiscal resources, the know-how, etc. do carry out the measures we have in our plan?”

Slide: 36

Time: 2 Minutes

Instructions:

By this point, the participants have invested a good bit of time and energy working on the details of their planning process (both the plan of work in Module Eight and the measurement plan in this module). With the completion of this Module, the formal portion of the SET training comes to a close.

Script:

"As you move forward with your implementation and measurement plans, please keep an eye on what is most important to your team: the end goal(s). At each measuring point, you want to keep the goal front and center so that you don't forget about it as you get involved in all of the details associated with getting your plan of work and measurement plans into action.

Some guiding questions to use along the way include:

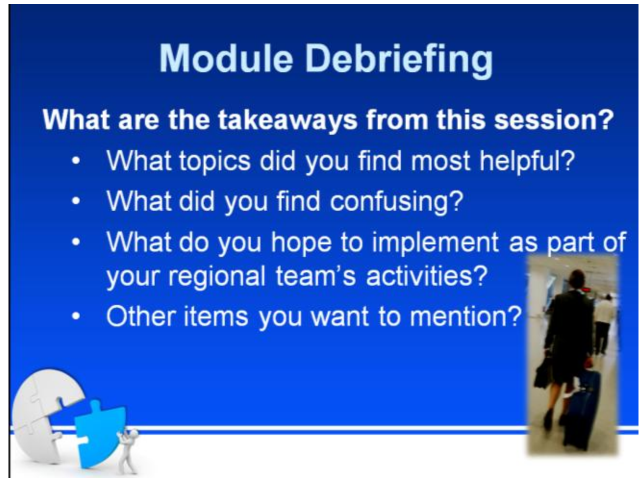
Did the strategies we implement:

- Move us closer to achieving our regional goals?
- Make effective use of our regional assets, strengths, and opportunities
- Generate additional problems (anticipated and unanticipated)?
-

Over the next several weeks/months, you team will have some exciting times as it works on its regional goals. Hopefully, taking the time to develop a sound plan and putting in place strategies for measuring your progress and outcomes, will position you to achieve much success as a team and a region in the future."

Slide: 37

Time: 2 Minutes



Instructions:

Use these questions as guides to carry out a debriefing on this final SET module and session. Be sure to take time for the group to discuss some of the key next steps they have in store as a regional team.

Script:

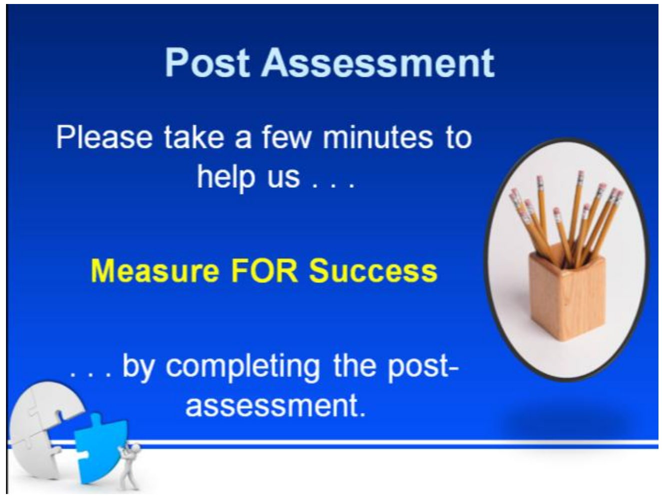
"As we have done with all of the Modules, we'd like to take a few minutes to get your thoughts about this session. [Lead a discussion based on the questions on the slide]

[If it has not already been established, have the group discuss next steps, including a date/time to meet back together so that the Plan begins to take flight.]

"Thank you for participating in the SET program. I am excited about the accomplishments you have achieved up to this point and the plans you have in place to pursue some important efforts in the region. I look forward to see the fruits of your hard work in the coming months."

Slide: 38

Time: 1 Minute



Instructions:

Provide copies of the post-assessment to all participants. Be sure to read the consent statement to the group (something that we are required to do in order to comply with the human subjects guidelines of the federal government). Also, remind participants to use the identification code that they created when they completed their pre-assessment.