Stronger Economies Together

Strategies for Building New Economic Opportunities

Module Nine: Measuring for Success

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Module Nine: Measuring for Success

Module Nine will set the final pieces in place to launch your team's regional initiatives by putting together a good measurement plan.

Using the *Participants' Guide*

The *Participants' Guide* contains handouts designed to assist participants in planning their economic development effort.

Group Exercises

The group exercises in this session provide a break from listening to presenter, while helping the participants understand the materials and get to know each other.

Slide 1:	Group introductions; use ice breaker if desired
Slide 2:	Reflecting on the previous session
Slide 4:	Discussing current measurements
Slide 20:	Handout Common Metrics
Slide 24:	Handouts Measurement Plan Template and Example
Slide 26:	Handouts Measurement Plan Template and Example
Slide 27:	Create plan (Measurement)
Slide 28:	Measurement Plan Feedback
Slide 34:	Your Plan: Wrapping It Up
Slide 38:	Post-Assessment and Post-Partnership Matrix

References

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Instructions:

Module Nine, the last session in the SET series, is designed to set the final piece in place in order to launch your team's regional initiatives.

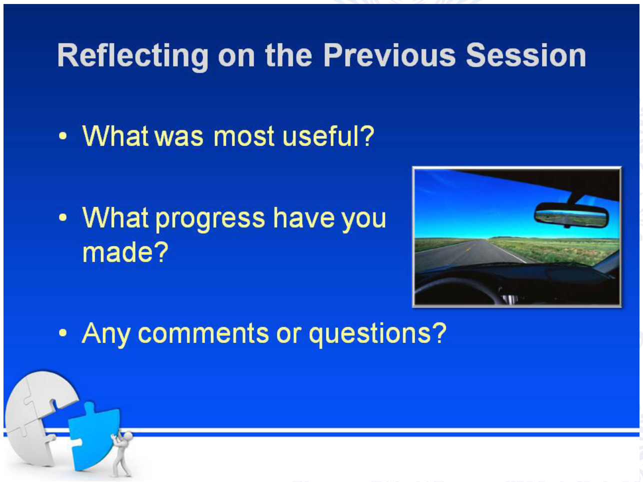
Script:

"Welcome to the final session of the SET training. We have explored a variety of different topics and many tools for moving your regional efforts forward. In this last SET module, you will put the final building block in place and have a solid foundation upon which to launch your initiative. Specifically, we'll explore Measuring for Success. Notice that we are not just measuring success. Instead, we will look at how we can use measuring to help us reach success – Measuring FOR Success."

Slide: 1

Time: 15+ Minutes. Have this slide showing as people enter the meeting room.

Instructions:



Make sure participants recall the key points from the last session. This important activity 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 group has completed the Planning Chart(s) and Plan(s) of Action from Module Eight 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 Action). If not, they need at least one completed set for one goal before beginning this session.

Slide: 2

Time: 5 Minutes

Script:

"Before we get started talking about new topics today, let's take a few minutes to reflect on what you felt were some valuable insights from the 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 on this slide."

Instructions:

The finishing touch on a good planning process is designing measurements to ensure success. This session focuses on the key elements of putting in place a good measurement plan.

Script:

Slide: 3

Time: 1 Minute

"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.

We'll cover:

- Exploring the value of measuring
- Deciding what to measure
- Using measures to promote success
- Tracking appropriate measures
- Creating a regional plan for measuring success"

Instructions:

People often have some pretty negative reactions to the topic of measurement or evaluation. The first question on the slide allows participants to share some of their own experiences (good and bad) in measuring or evaluating 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. This will provide you some insights into the kinds of experiences the participants have had with evaluation. This discussion can be accomplished in small groups, in pairs or as a large group. Try to vary how you approach discussions so many participants have an opportunity to share their experiences.

Slide: 4

Time: 10 Minutes

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?"

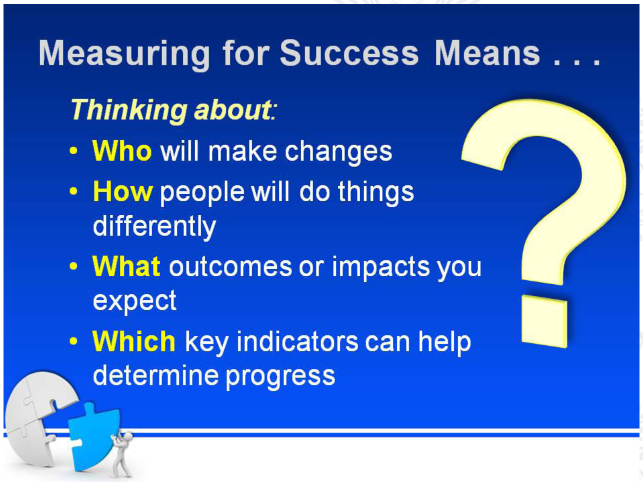
[List responses on a flip chart. If the group seems to be overlooking a key point from this list, guide the discussion to foster that insight:

- Know if the 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 local people, communities and organizations that are not yet onboard or those outside your region who may want to invest in the work of your regional team once they see what is planned.)]

Instructions:

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



Script:

Slide: 5

Time: 2 Minutes

"Several core items will guide the team on path for measuring for success. Clearly, measuring everything is not necessary, nor is it practical. However, thinking through these key questions will be very useful.

Measuring for success means thinking about:

- **Who** will make changes because of what you have accomplished? In Module Eight, 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 is your plan 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."

Instructions:

This section leads participants through a short reminder of Module Eight's key terms and concepts, preparing them to identify complementary measures.

Script:

"With all the variety of possible measures available, one of the first challenges is deciding what to measure. Trying to measure everything will be cumbersome, at best, and, frankly, just plain impossible to do. Let's begin to think about what is important."

Slide: 6

Time: 1 Minute

Instructions:

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

Script:

Slide: 7

Time: 2 Minutes

“We talked at the beginning of this session about what you already measure. Most organizations tend to focus on the things your organization does (strategies) and on 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, the ABCs we discussed in Module Eight.

However, measuring what we do is not the same thing as measuring the difference we make. When an organization only measures what they are doing (i.e. number of workshops held, number of clients assisted, etc.), paying scant attention to the real difference they are making over time, that organization is missing an opportunity to measure real success. We spent a good bit of time in Module Eight identifying the strategies and ABCs (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.”

Instructions:

The next few slides will help participants begin to separate the measuring of strategies from that of real impacts. While both are important, we too often focus on strategies and neglect impacts. We want to make sure participants have a good grasp of each concepts and the importance of measuring both.

Script:

Slide: 8

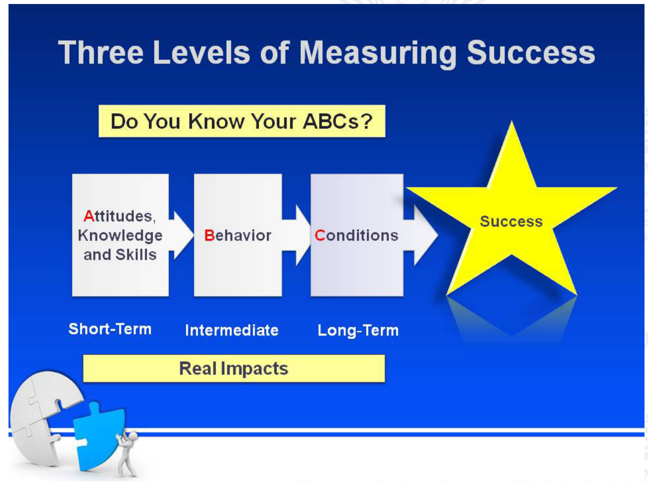
Time: 2 Minutes

"Most organizations focus on measuring things that they do directly. These include both what they 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 strategies.

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

Do these measures tell you whether you've made a real difference over time? Probably not. For that, we need to dig deeper."

Instructions:



Participants will review the ABCs (real impacts) identified in Module Eight to prepare to design a measuring process based on these components. 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, a longer period of time has passed, you may want to take more time here to make sure all participants understand the terms.

Slide: 9

Time: 2 Minutes

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 the ABCs refer to three types of change:

- **A:** Attitudes, knowledge and skills change can usually happen in a short period of time.
- **B:** Behavior changes result from changes in attitudes, knowledge or skills and thus, takes a bit longer than the 'A' level.
- **C:** Conditions of a person, group or region change as people shift behaviors. This level of change is typically more than a year down the road from the beginning of the initiative.

Thinking of the ABCs of success is a nice simple way to consider what to measure as we move forward with our regional plans. Remember that all three are vital to reaching success, and measuring each provides an opportunity to make course corrections along the way. I'll show you how this works in the next series of slides."

Instructions:

During this section, participants will see 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 we can discover how we can really improve our chances of achieving success with regard to our regional goals and strategies.”

Slide: 10

Time: 1 Minute

Instructions:

The next few slides will walk participants through an example that helps make the case for embracing a comprehensive approach – one that measures both outcomes and outputs.

Script:

Slide: 11

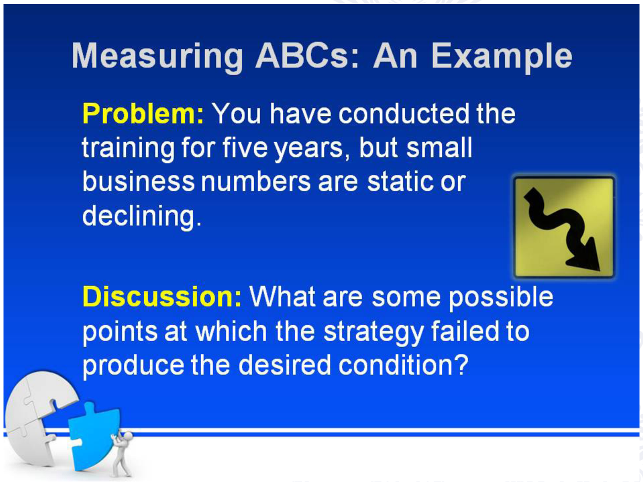
Time: 1 Minute

"Let's turn to a simple example of how measuring can help promote success.

Suppose your team decides to implement a training program to help small business owners build and manage a Web site (strategy) that will increase their sales. By doing so, your team hopes this will strengthen the vitality of the small business sector in the region (overall goal). But wait . . . There's a problem!" [Go to the next slide.]

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 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 points along the way where the strategy may have failed to produce the desired condition? [Allow for responses.]

The reality is, 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 implement course corrections to help keep the strategy on track. Let's take a closer look at how this works."

Slide: 12

Time: 2 Minutes

Instructions:

Measuring what we did (strategies) is still a crucial part of the story. Help participants realize the value of this type measure.

Script:

Slide: 13

Time: 5 Minutes

"As we noted, the most common practice in evaluation is documenting strategies. Measuring and documenting what you did, how many times, and what groups or individuals took part in our activities is still an important part of the story.

For this example, we would want to know:

- 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?

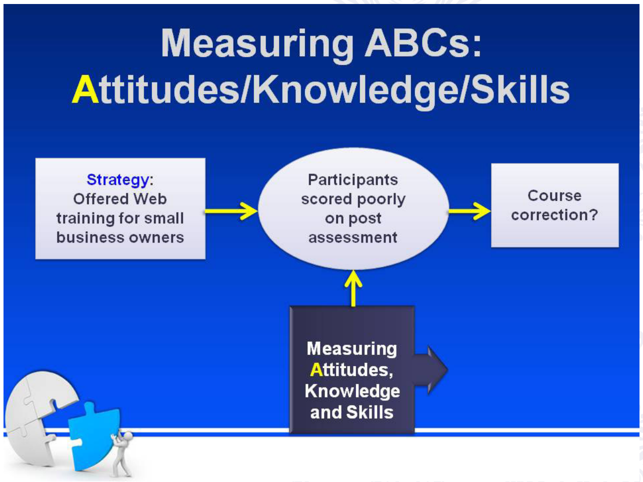
These numbers alone might guide us on some possible course corrections. For instance, if very few people took advantage of the training, or those who did were not the type of businesses we had hoped to attract, what possible corrections do we need to consider?"

[Allow for responses. Possible answers include:

- Change advertising strategy
- Change when the training is offered
- Change the training format
- Personally appeal to the small businesses we want to reach
- Other ideas . . .]

Instructions:

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



Script:

"Now, let's pretend 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 to see. How can we explore possible causes and chart course corrections?

The next step is to consider is measuring attitudes/knowledge/skills.

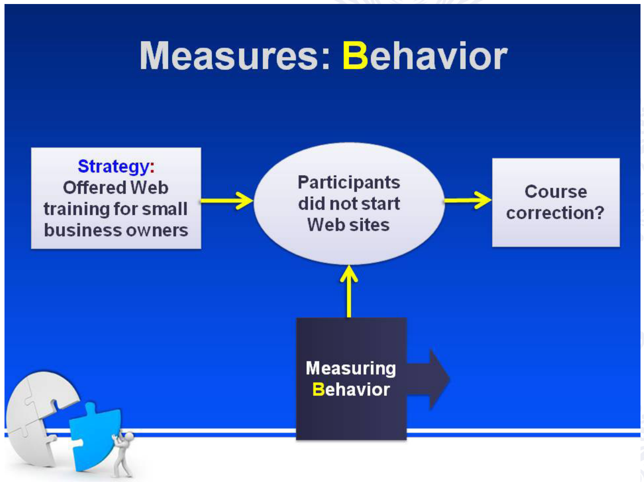
In our example, suppose you developed a post-assessment of the attitudes/knowledge/skills gained by participants taking part in the training, but participants scored poorly on the assessment, indicating little or no changes in attitudes, knowledge or skill. What course corrections would you consider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

Slide: 14

Time: 2 Minutes

Instructions:

Walk participants through this next example, one that focuses on an behavior measures.



Script:

"Now, suppose that students performed well on the post-assessment, but did not create any Web sites (the behavior you hoped would happen). What are some possible issues or problems 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 Web site.]

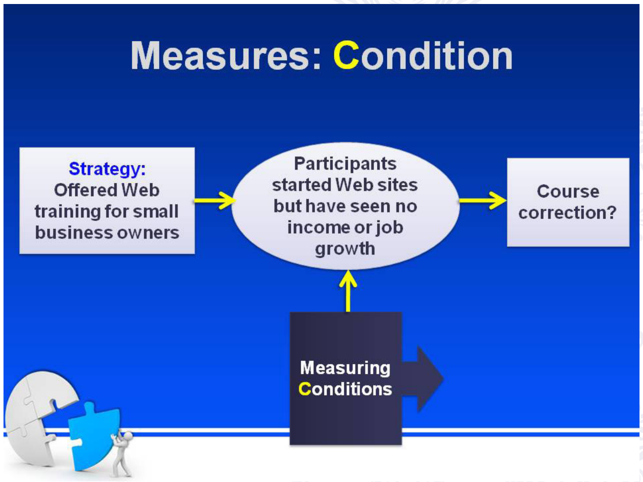
What are some possible course corrections at this point? How would you determine what course correction is needed?" [Allow for discussion.]

Slide: 15

Time: 5 Minutes

Instructions:

Conditions tend to be the most difficult to measure and thus, are often omitted in evaluation activities. However, they are an essential component to determine the team's effectiveness in achieving their goals.



Slide: 16

Time: 5 Minutes

Script:

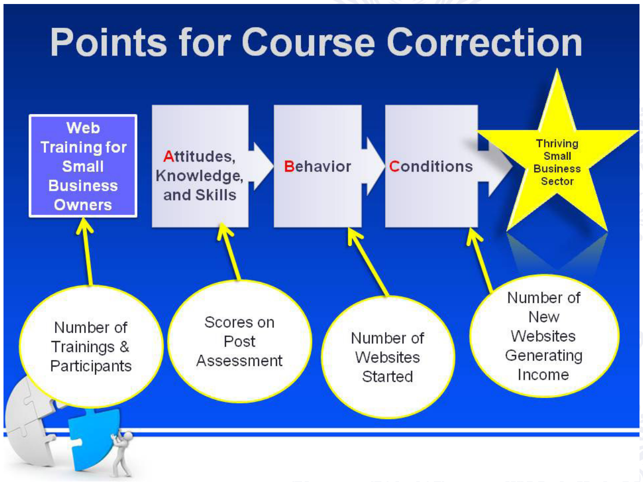
"Now, consider one more possible correction point. Suppose that participants in your training course complete the sessions, and all have developed and launched Web sites. However, none of the businesses have seen any income or job growth as a result. What may be some of the reasons behind this unfortunate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

[Again, encourage discussion among participants. Possible answers include:
- Web sites are not customer friendly.
- Web sites are not well linked or marketed.
- Product or services being marketed may be unclear or not very compelling.
- Outside conditions (i.e. economic downturn) could be to blame.
- Web sites are not regularly updated/maintained.
- Other ideas?]

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

Instructions:

This slide assembles all of the check points that can help re-direct or refine a strategy that can ultimately help the team successfully reach its goals.



Script:

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

Slide: 17

Time: 1 Minute

Instructions:

The next series of slides introduces the variety of approaches to measuring strategies and ABCs.

Script:

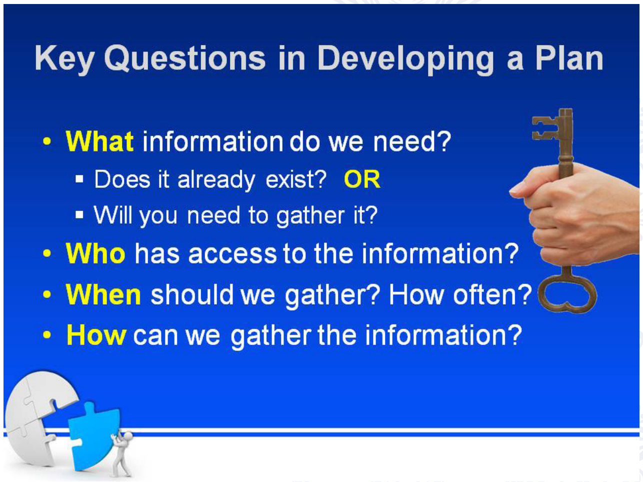
"We will devote the next series of slides to exploring methods for collecting the information you'll need to help document your efforts."

Slide: 18

Time: 1 Minute

Instructions:

The items outlined on this slide describe some key questions the team should address in developing a good measurement plan.



Script:

Slide: 19

Time: 3 Minutes

"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 for each of these key components. Consider these 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? An organization may already have the information we need or may know of a way to secure the information. For example, schools or government agencies may have information on high school graduation rates, dropout rates, etc. On the other hand, we may need to gather the information 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 undertake. However, gathering information before and after your program or project is a good standard so you can measure the nature and level of changes in your target audience. Of course, as we've noted before, it's a good idea to do some checking at different points along the way so 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."

Instructions:

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

Slide: 20

Time: 2 Minutes

Handout:
One – Common Metrics

Script:

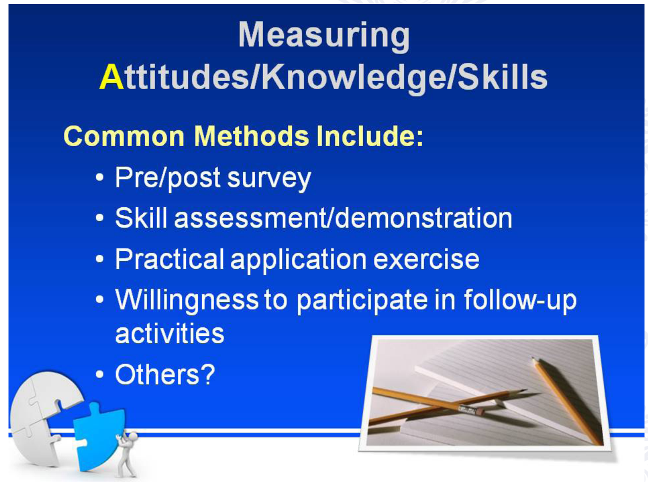
"Here are some quick guides for choosing your measures. First, keep in mind that measuring everything is not the goal. Instead, the key is to carefully select a few important measures. Consider these quick guidelines:

- **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 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 your team could realistically monitor and anticipate impacting through appropriate strategies.
- **Be smart.** Look for data that is already being collected and that provide indicators of change you want to track. Explore the data already available for your target area/group. [This is a good time to refer back to Modules Five and Six.]

Handout One contains a resource list of commonly used metrics."

Instructions:

This slide highlights some common methods used to measure changes in attitudes/knowledge/skills.



Script:

Slide: 21

Time: 2 Minutes

"Let's look at a few examples of ways to measure each of the ABCs. Measuring changes in attitudes/knowledge/skills (the As) are usually the easiest to do, using one or more of these common methods:

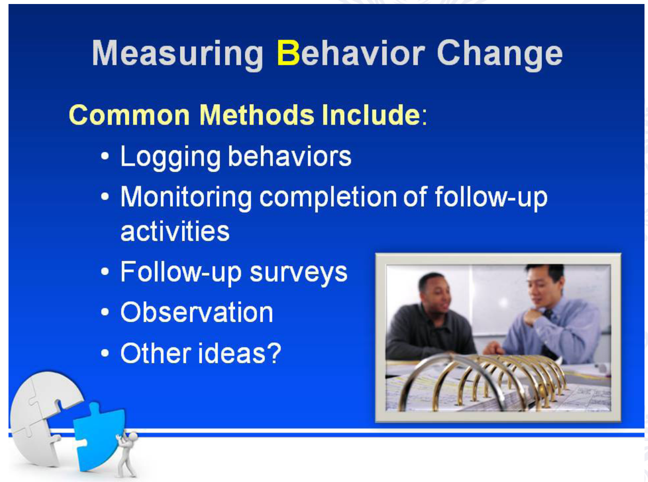
- **Pre/post survey:** A few key questions related to attitudes or knowledge can help you quickly assess a participant's change in these two areas.
- **Skill assessment/demonstration:** When teaching a skill, having participants demonstrate the skill is a great way to see if they have successfully mastered it.
- **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 positive aspects of these different approaches? What are some challenges or limitations associated with these different information gathering strategies?" [Allow for discussion.]

Instructions:

Focus on the evaluation methods designed to measure changes in the target audience's behavior.



Slide: 22

Time: 5 Minutes

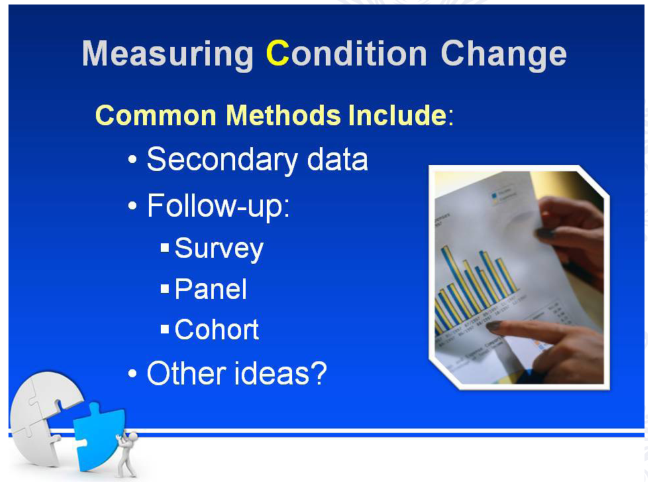
Script:

"As we move further along on the ABC continuum, we consider documenting changes in behavior. Some common methods for measuring behavior changes include:

- **Logging behaviors:** This works well for participants who will be part of a program 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 developing a program for high school seniors with the goal of increasing college entrance rates. One behavior 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.). You may want to track the number of hours they spend studying each week by subject.
- **Monitoring 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 inbox asking for input after an event or experience of some kind. These can be useful tools for 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 need to make to their business Web sites. 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. As another example, if you've provided hospitality training to main street businesses in your town, you could periodically visit these stores to see if the principles of good hospitality are being practiced by the shop owners and employees.

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

Instructions:



This is the final slide before participants begin working on their own plans. Measuring changes in conditions is usually the hardest dimension to measure appropriately. At the same time, it is the most crucial aspect of any measurement plan since it is the direct tie to your goal, or what you ultimately hope to change.

Script:

Slide: 23

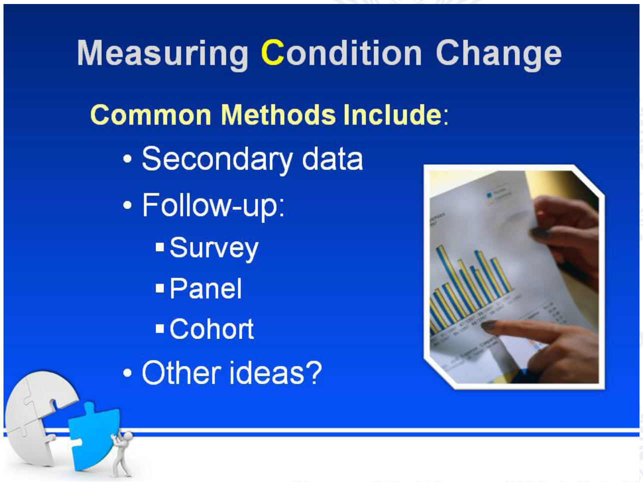
Time: 5 Minutes

"Long-term changes in conditions require some well-thought-out planning. Typically, they are hardest to measure, but in many ways, the most meaningful. If we adopt a strategy that changes the attitudes/knowledge/skills and the behaviors, but fail to make any dent in the condition, we have missed the mark. It is tempting, though, to skip this step because of the extra challenges condition measuring entails. However, some well-accepted ways to measure conditions provide doable options for your team. Some common methods for tracking condition changes include:

- **Secondary data:** As was noted in Module Five, 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 realistically tied to your strategy.

  For instance, assume that your team launched a program to reduce high school dropout rates by 25 percent in five years in your region. Dropout data is published every year by each school district in your region. These annual reports could allow you to monitor the progress being made in achieving your five-year goal. Certainly, you will 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.

Script (Cont.):



Slide: 23 continued

Time: 5 Minutes

- **Follow up with participants:**
  - *Surveys* - Like measuring behavior changes, surveys or other methods of following up with participants can help note changes in their conditions. For instance, sending a survey to participants at spaced intervals can check on changes in conditions you hoped to achieve.
  - *Panel Study* - Another follow-up approach is a panel study. The panel study involves selecting a good cross-section of people targeted by your program. 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 on dropout reduction.
  - *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. You can then track their performance over the course of their four years in high school. In this type of study, the ninth graders are considered a cohort.'

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

Instructions:

With the majority of the content in this module now completed, participants will 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 defined goal, but then compare across these goals to see if overlaps exist in what they propose to measure. 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.

Slide: 24

Time: 1 Minute

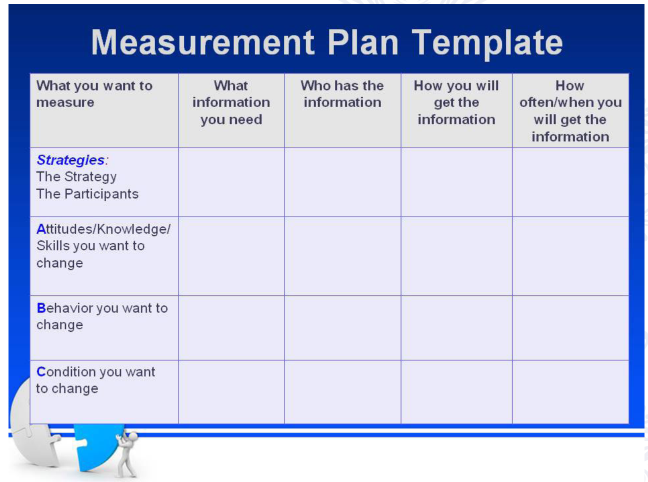
Handouts:
Two – Measurement Plan Template
Three – Measurement Plan Example

Script:

"Now that we have discussed some basic strategies for building a good measurement plan, it's time for your team to develop a measurement plan that aligns with your major goals. Your plan will detail the specific types of measures you will use to document the ABCs associated with each of your goals."

Instructions:

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


Measurement Plan Template

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
Strategies: The Strategy The Participants				
Attitudes/Knowledge/ Skills you want to change				
Behavior you want to change				
Condition you want to change				

Script:

"Here is a simple 'Measurement Plan Template' to guide your thinking as you select the various elements to incorporate into your plan. Space is included to write your identified strategies and ABCs in the far left-hand column under the heading, 'What you want to measure.'

For each item you want to measure, specify the following:

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

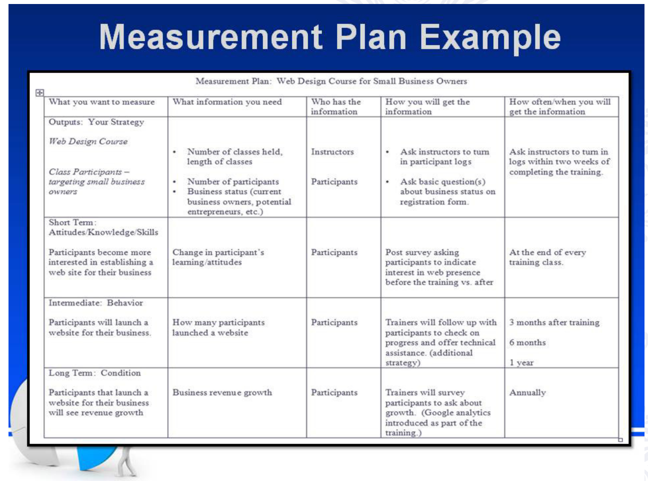
Let's look at a quick example to get us started." [Next slide.]

Slide: 25

Time: 1 Minute

Handouts:
Two – Measurement Plan Template
Three – Measurement Plan Example

Instructions:



Measurement Plan Example

Measurement Plan: Web Design Course for Small Business Owners

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

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 (Handout Three) is provided. Use this page to help participants grasp the end product for their own Measurement Plans.

Script:

Slide: 26

Time: 2 Minutes

Handouts:
Two – Measurement Plan Template
Three – Measurement Plan Example

"This slide presents an example of a simple measurement plan 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.

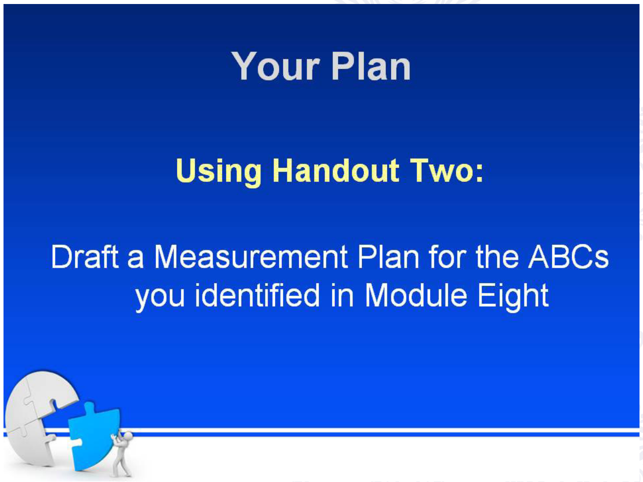
You can see that for each of the strategies and the ABCs, we have identified the measures we want to capture, the individuals/groups we can tap to secure the information, how we plan to obtain that information, and when and how often we plan to gather the necessary information.

Sometimes, as you walk through this process, you may be able to actually identify additional supporting strategies or steps to incorporate into your Plan of Action. 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 to conduct one-on-one visits with the class participants and offer technical assistance if they are experiencing difficulty moving forward with their Web-based activities. We need to add these new steps to our Plan of Action completed in Module Eight.

Also, when we approached the Conditions measure, we decided that we should add some instructions on 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 regional small business owners – we have already made some important adjustments in our plan, corrections that are likely to improve our chances of meeting our goal."

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 will provide time to work on your Measurement Plan. Using the Planning Chart developed in Module Eight, measure at least one change in each of the ABCs associated with each goal. Design a plan that identifies needed data, information sources, plans for accessing the data and a timeline for measurements. Be sure to include measures of strategies as well, the 'what you will do' part."

Slide: 27

Time: 15-20 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 they identified for their Plan of Action as a result of going through the Measurement Plan.

Script:

Slide: 28

Time: 7 Minutes

"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?"

Instructions:

Since one purpose of this initiative is the development of the regional partnership itself, have the group consider how they will monitor and chart course corrections in terms of strengthening their connections with each other. This is crucial to the regional initiative's success.

Script:

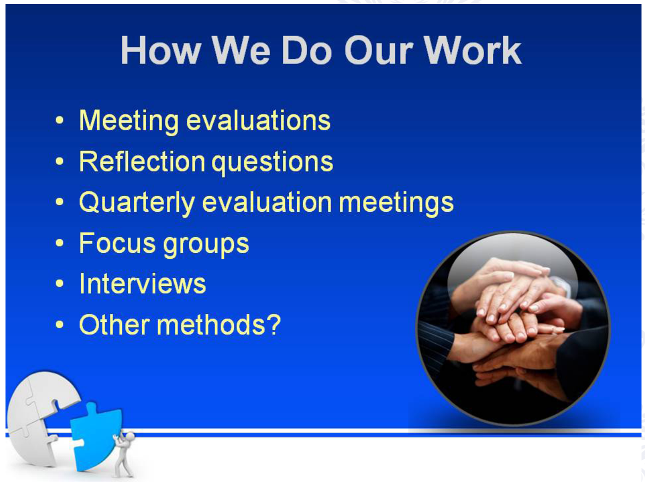
Slide: 29

Time: 1 Minute

"One of the key elements of this initiative is to develop this regional partnership. YOU are important! Your team members and the resources they provide are the things that will help your team's regional efforts get off the ground. Without these assets, your plan will not move forward, so measuring matters here too. Measuring assets takes on a different look than more traditional measures. While some numbers may be involved, the focus is more about how you are doing as a team than just numbers. It involves thinking about the way the team works together and fine-tuning processes that will strengthen the partnership. Let's take a few minutes to consider some of these."

Instructions:

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



Slide: 30

Time: 2 Minutes

Script:

"You can collect information on how well your team works together by 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 the measures.

If some people no longer attend the team meetings, contact them to find out why they have decided to stop attending. While some may have very legitimate reasons that have nothing to do with the team, others may be unhappy with the way the team operates. The intent is to identify and correct problems with the functioning of the team before things get out of hand or before attendance diminishes.

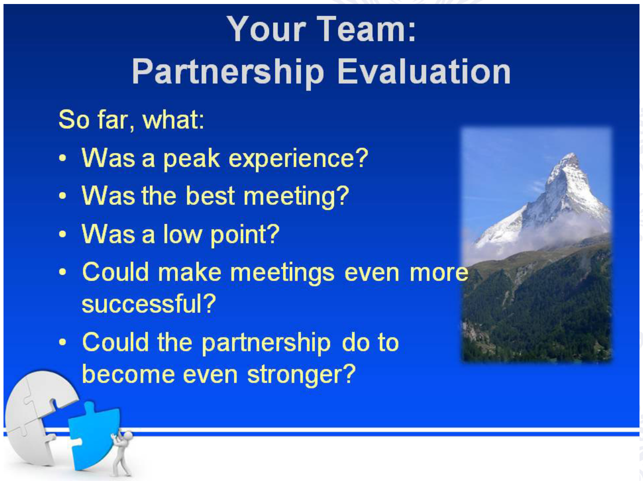
Some of the ways you can check the pulse of your regional team's health include:

- Meeting evaluations
- 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 you have as a team
- Focus group sessions in which the team considers a small core of questions about the effectiveness of the regional team and ways to make it stronger
- Interviews with a subset of team members and/or of people who have stopped taking part in regional team activities

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

Instructions:

Lead the group through this "real time" process evaluation guide. Use these questions to guide them in discussing 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 improve the way they work as a regional team.



Slide: 31

Time: 5 Minutes

Script:

"This slide provides an example of a partnership evaluation that can be used to help improve the regional team. Since we have been meeting together for several sessions now, it is appropriate to consider how well the team is functioning so far and ways to improve the team's performance.

- What has been a peak (positive) experience for you as 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 was a low point along the way?
- What would help future meetings be even more successful?
- What could the partnership do to become even stronger?"

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 identified measures.

Slide: 32

Time: 1 Minute

Script:

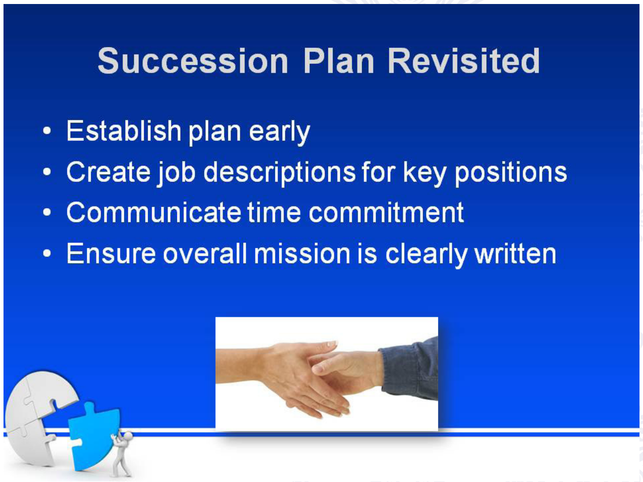
"Based on our discussion, let's take a few minutes to carefully consider how we can enhance this regional partnership.

- 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 Action to ensure that this vital focus is not lost?"

Instructions:

This slide is drawn from the discussion of succession planning in Module Three. At that point, the team was introduced to this concept, but groups may not have been ready to complete the plan in those early stages. Now, however, is the time to complete this plan if not already in place. If the plan is in place and has been recently reviewed, you can still take a moment to show how this plan can help keep the team on track.



Slide: 33

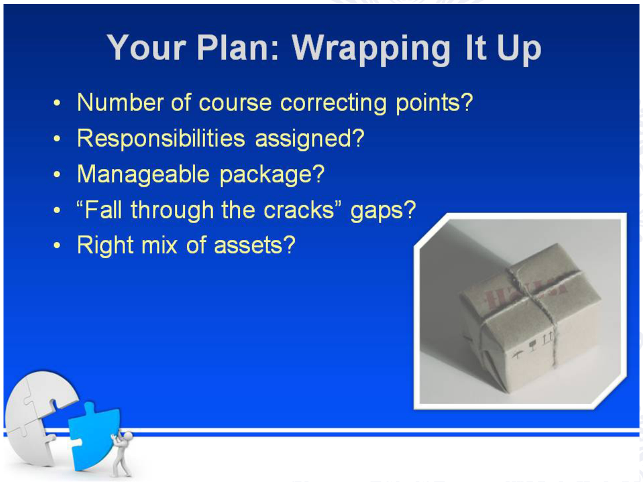
Time: 5 Minutes

Script:

“You may remember in Module Three that we discussed the importance of a succession plan for the regional team. During those early days of meeting together, designing all the elements may have been difficult. However, now that your goals and plans are in place for the region, finalizing your succession plan will be vital. [At this point, lead a discussion around any missing pieces of the plan. If work is needed to complete it, establish a clear timeline and responsibilities for getting the task accomplished.]

How can having this plan in place and in use aid in the success of this group?” [Allow for responses.]

Instructions:



This slide is designed to get the group to step back from the detailed work they developed to assess the total Measurement Plan by thinking through the questions on the slide.

Script:

Slide: 34

Time: 10 Minutes

"Now that we have the pieces of our Measurement Plan identified, let's take a step back and take a 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 checkpoint? 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 new steps needed in the Plan of Action 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 element of the plan? Are there holes that could threaten the initiative's success if not monitored?
- Do we have the right mix of assets to make the plan a reality?"

Instructions:

By this point, the participants have invested much time and energy working on the details of their planning process (both the Plan of Action and the Measurement Plan). With the completion of this module, the formal portion of the SET training comes to a close.

Script:

Slide: 35

Time: 2 Minutes

"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, keep the goal front and center so you don't become bogged down in the details associated with getting your plan into action.

Here are some guiding questions to use along the way. Did the strategies:

- 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, your team will have some exciting times as it works on its regional goals. Hopefully, developing a sound plan and putting in place strategies for measuring your progress will position you to achieve much success as a team and for your region in the future."

Instructions:

Review with the team the steps that are part of the formal SET initiative plus anything else relevant to their planning.

Script:

"While this ends the formal SET modules, the work is just beginning. Now is where the excitement builds! A few items will take the group forward:

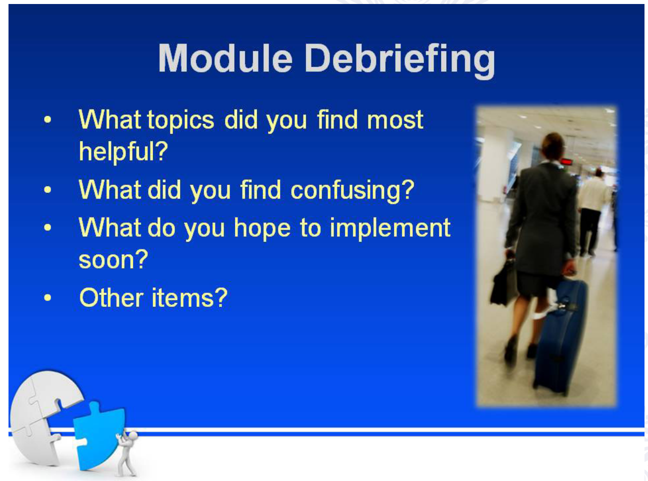
- 40 hours of technical assistance [If the group has not already outlined how this time will be used, lead a discussion of the needs for help.]
- Completing all elements of the planning process" [Review the Next Steps document to remind the team what they must submit from their efforts. These include the Plan of Action from Module Eight, the regional teams' plans for communicating to the public and plans for a regional celebration of success. These items help generate continued evaluation and support for SET in the months to come. All items are due within 45 days of completing this session.]

Slide: 36

Time: 2 Minutes

Instructions:

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



Slide: 37

Time: 5 Minutes

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.]

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 seeing the fruits of your hard work in the coming months."

Instructions:

Provide copies of the post-assessment and post-partnership matrix to all participants. Be sure to read the consent statement to the group (something 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 they created when they completed their pre-assessment.

Slide: 38

Time: 1 Minute

Worksheets:

Module 9 Survey
Post-Assessment
Post-Partnership

Acknowledgements

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