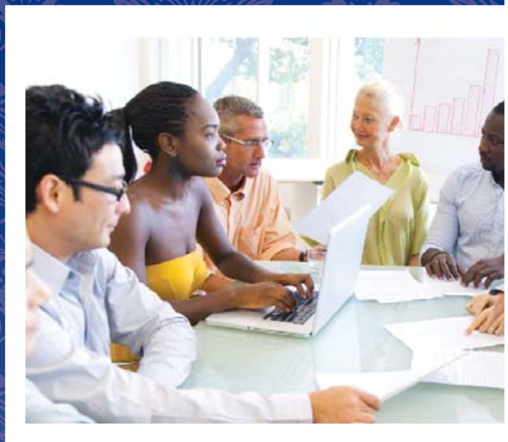

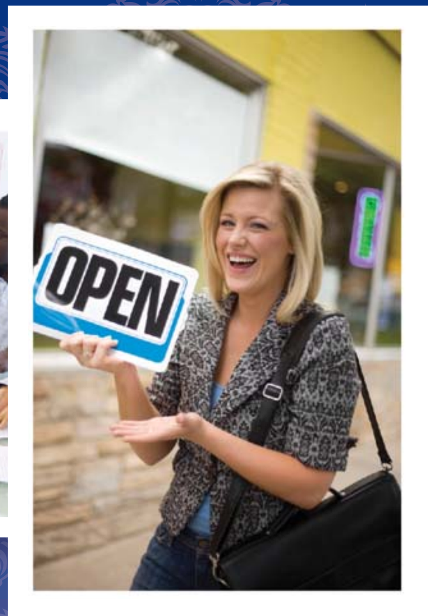

Stronger Economies Together

Strategies for Building New Economic Opportunities

Module Nine: Measuring for Success

Rachel C. Welborn, Southern Rural Development Center

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.

Important Note
Be prepared to administer the post-survey and partnership matrix at the close of this session. Before printing, please insert into the first column of the partnership matrix the list of people who have attended SET training in the region.

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 2:	Which one is you?
Slide 3:	It's personal
Slide 10:	Handouts: Measurement Plan Template and Example, Ideas and Sources for Measuring
Slide 11:	Measurement Plan feedback
Slide 13:	Next steps

References

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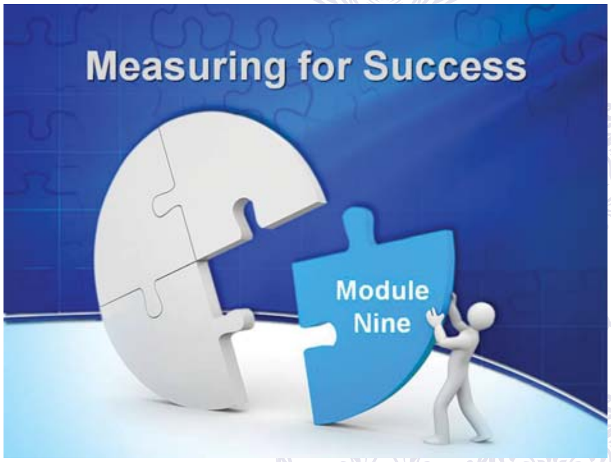
Instructions:

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



Script:

Slide: 1

Time: 1 Minute. Have this slide showing as people enter the meeting room.

"Welcome to the final training module of SET. While this is the final training section, the work of SET in your region is just beginning. 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."

Instructions:

This slide gives participants an opportunity to share their overall attitudes toward evaluations or measuring in general.

Script:

“No matter what your job, you probably have some experience in measuring or evaluating various elements of our work. From that, we all develop some general feelings about the topic of measurement. So which one of these best depicts how you feel?

1. I’m already in tears.
2. I don’t even want to think about it.
3. Wake me up when this session is over.
4. I love to measure progress!”

[Allow for responses. Keep it fun, but give people a minute to talk about why they have developed these different attitudes.]

Slide: 2

Time: 5 Minutes

Instructions:

This slide is designed to help participants relate to the value of measuring by starting on a more personal level. Most will recognize that keeping tabs on at least some of these measures is important for future personal success.

Script:

Slide: 3

Time: 5 Minutes

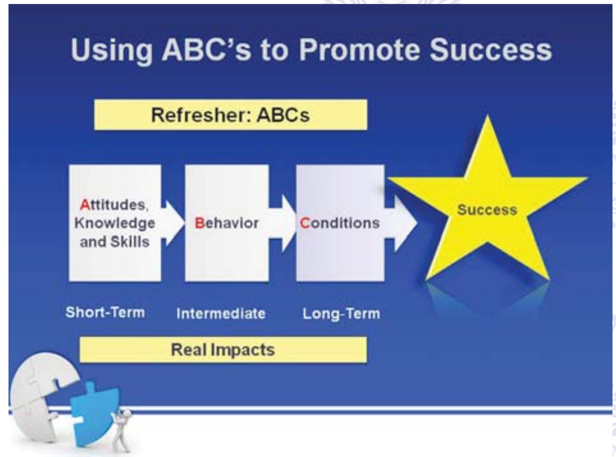
"Let's start by thinking about the topic of measuring from a more personal perspective How many of you keep up with at least one of these measures on a regular basis? [Give time for reactions.]

Why are these important to you? [You may want to jot key ideas on a flip chart.]

We will be spending time today talking through how some of these same key ideas relate to our work in the region."

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. However, if a longer period of time has passed, you may want to take more time here to make sure all participants understand the terms.



Slide: 4

Time: 10 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 changes can usually happen in a short period of time.

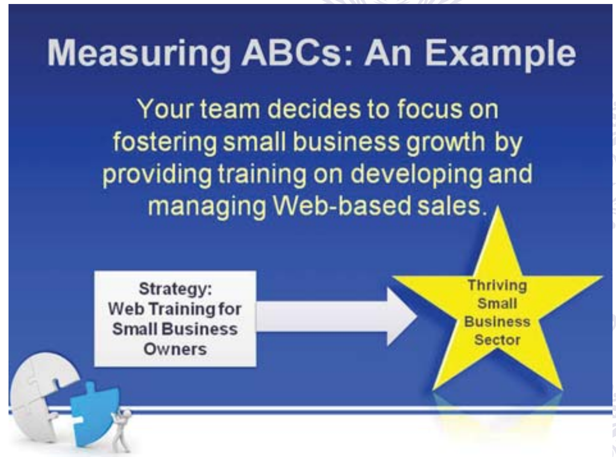
B: Behavior changes result from changes in attitudes, knowledge, or skills, and thus, takes a bit longer than the 'A' level.

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:

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: 5

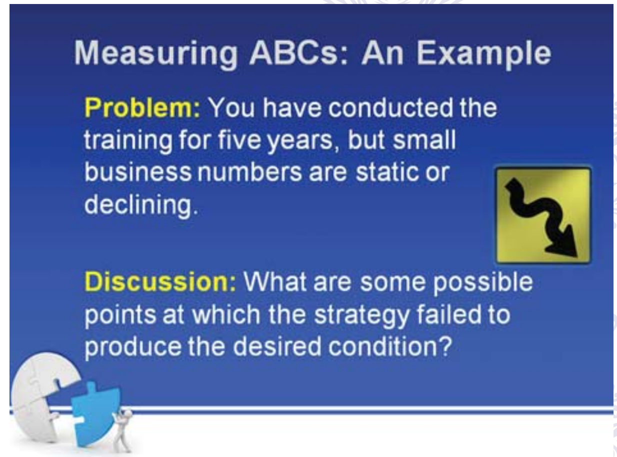
Time: 5 Minutes

"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 website (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:

Slide: 6

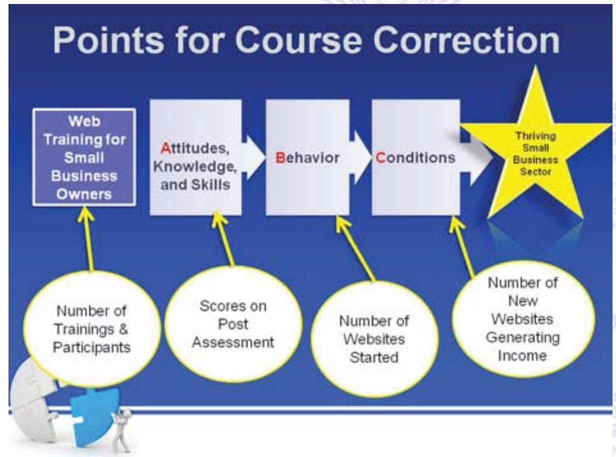
Time: 10 Minutes

"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."

Instructions:



This slide assembles all the check points that can help re-direct or refine a strategy, which can ultimately help the team reach its goals successfully. Talk through how each of these can help identify a potential course correction to keep the initiative on track toward the goal. Have participants consider how they could correct a course at any of these steps with information from the potential measures.

Script:

Slide: 7

Time: 5 Minutes

"By measuring both strategies and ABCs, we are 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. For instance:

- Measuring the number of trainings and participants tells us whether or not our marketing materials are working to bring people to the sessions. It may also tell us whether our choices of dates/times/locations are ideal.
- Post assessments can give us an idea whether or not the participants understood the material presented.
- Number of websites started gives us a glimpse at potential needs for technical assistance or other implementation needs.
- Websites generating income may help in tweaking the quality of sites as business owners progress."

Instructions:

With the foundation for this module in place, participants will begin developing their own measurement plans. The next few slides will set the stage.

Script:

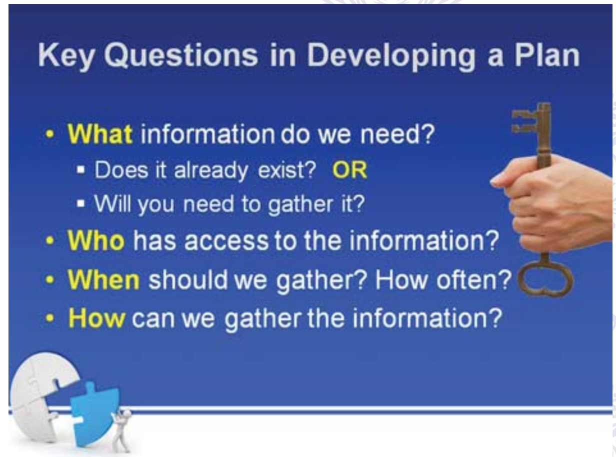
“Now that we have discussed some basic strategies for building a good measurement plan, it’s time for your team to begin work on your region’s plan that aligns with your major goals. Your plan will detail the specific types of measures you will use to document the ABCs associated with each of your goals.”

Slide: 8

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: 9

Time: 5 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?

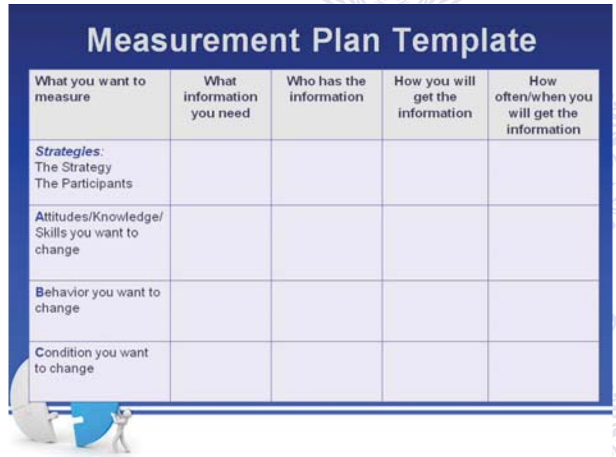
- **Who** has access to the information we need? An organization may already have the information we need or may know of a way to secure the information. For example, schools or government agencies may have information on high school graduation rates, dropout rates, etc. On the other hand, we may need 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 have noted before, it is 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."

Instructions:

Introduce the Measurement Plan Template (Handout Two) and go over the elements before dividing into small groups to complete the handout.



Script:

Slide: 10

Time: 45 Minutes

Workbook:
Handout One–Ideas and Sources for Measuring
Handout Two–Measurement Plan Template
Handout Three–Measurement Plan Example

"Here is a simple Measurement Plan Template (Handout Two) 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, think about the following:

- What information will 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 work through an example to get us started."

[Using a white board, chart paper, or the Word version of this document projected on a screen, walk participants through the elements using one of their regional goals. You can also distribute Ideas and Sources for Measuring (Handout One) and Measuring Plan Example (Handout Three). Once you have walked through an example together, have the participants divide into smaller groups based on the number of identified goals and work on designing a measurement plan (using this template) for their goals. Provide time at the end for feedback and discussion. Look for overlaps and gaps in data collection. Are there items that can be combined? Missing pieces, etc.?]

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 (Module Eight) as a result of going through the Measurement Plan.

Script:

Slide: 11

Time: 10 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:

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: 12

Time: 5 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 or months, your team will have some exciting times as you work on your 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:

Finishing the ninth SET training module does not mean the work of SET is over. In fact, it is just beginning. Just as having a house blueprint is not the same thing as building a house, having a regional plan does not mean you are building a regional economy unless you put the plan into action. Use this slide to solidify plans to complete the regional plan, in keeping with the High Quality Plan Guidelines, and to present it to the State Partner Team for feedback and guidance. Feel free to add other steps appropriate for your region to ensure that the plan is completed and put into action.

Slide: 13

Time: 10 Minutes

Script:

"Now that we have all the planning pieces in place, we are ready to finalize the plan and share it with the State Partner Team for their feedback and guidance."
[Talk through the timeline that fits with the regional team's work.]

Acknowledgements

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