

Performance Measurement and Social Indicator Reporting

- Session Outline -

1. **Brian Stipak** – Introduction to Topic (~15 min)
2. **Jeff Tryens** – Examples from his Continuing Work with Government Strategic Planning and Reporting (~15 min)
3. **Gary Blackmer** – Insights from his Performance Measurement and Auditing Experience in Local and State Government (~15 min)
4. **Audience Participation** (~25 min)

STIPAK SLIDES

?

What do you know as a program evaluator
about “performance measurement”?

What do you know as a program evaluator
about performance measurement?

Obviously,

- “Performance Measurement” is **impossible**.

How the Term, “Performance Measurement” Misleads

- Misleads people to think that performance measurement reports measure government performance.
- Misleads people potentially to wrong conclusions about program performance.
- Misleads people to think that impact program evaluation is just a measurement process.
- ➔ Perhaps the old term, “Social Indicator” is better, less misleading.

If the don't measure government performance, What do performance measurement reports really do?

- Gary's metaphor: Instrument panel of car
- Provide information for program planning
 - Needs assessment

How well are performance measurement, indicator reports serving as our dashboard?

- Oregon Benchmarks, Oregon Progress Board, Portland Multnomah Benchmarks no longer exist.
 - Jeff would have lost his job if he hadn't run off to Australia!
- Portland's SEA Report has been eviscerated.
- Portland's "Managing for Results" exercise did not go very far.
- Other historical jetsam: PPBS, program budgeting, MBO, scientific management

Why the failure?

- Public organizations in the U.S. will usually not engage in high-level policy planning in a rational, data-driven way, and if so for only short periods when under special leadership.
 - Cf. Charles Lindblom article, “The Science of Muddling Through”
- Implication: Data-driven planning efforts like Jeff’s will have only ephemeral success under unusual leadership, dying quickly when leadership changes.

“The Utility and Futility of Data-Driven Change” (session sub-title)

My View:

- **The Futility:** Most high-level planning exercises, especially involving legislative bodies
 - “Performance Management” – The latest *au courant* incarnation of rational policy-making destined to failure
- **The Utility:** Lower-level targeted applications
 - Program Evaluation
 - Performance Auditing

Charge to the Panel (and Audience)

- What utility can we realize from performance measurement, indicator reporting?
- What data-driven change is possible?
- How much of our precious resources should be spent on:
 1. Broad indicator measurement efforts?
 2. Program evaluation, performance auditing?
 3. Just spend all on service provision?

TRYENS SLIDES

Democracy is the worst form of
government.....

....except for all the rest.

Winston Churchill

The same could be said for
indicator & performance reporting.

From the get-go

1. I completely disagree with Brian's assertion that "performance measurement is impossible."

Difficult - Yes.

Incomplete - Yes.

In need of context - Yes.

Easily marginalized - Yes.

But certainly possible.

From the get-go

2. I somewhat disagree with Brian's assertion that performance reporting has failed.

In Oregon - I, generally, agree.

But in the rest of the US and the rest of the world
- Some successes.

3. I almost agree with Brian that successful reporting programs are dependent on involved leadership. I would add the word many.

Characteristics of Effective Indicator Programs

27 programs were surveyed that...

1. are intended to improve community well-being;
2. use community-level indicators to inform, engage, intervene, or fund;
3. are considered at least somewhat successful; and
4. represent a broad cross-section of types (including non-government) and locations.

Methodology: Respondents self-assessed their effectiveness.

- Of the 27 programs responding, 11 considered their programs very effective at engaging partners overall.
- The 11 very effective programs were compared with the 16 programs that rated themselves somewhat effective at engaging partners overall.

Programs that say they partner very effectively
are more likely to be in business to.....

- inform sponsors about community issues;
- influence sponsor's decision making;
- spur community action;
- facilitate public/private alignment; and
- facilitate systems thinking.

They are less likely to be in business to....

- increase public awareness.

OVERSIGHT: Programs that say they partner very effectively are more likely to say that.....

- community indicators are central to their programs;
- overseers are very familiar with program information; and
- overseers use program information.

INDICATORS: Programs that say they partner very effectively are much more likely to.....

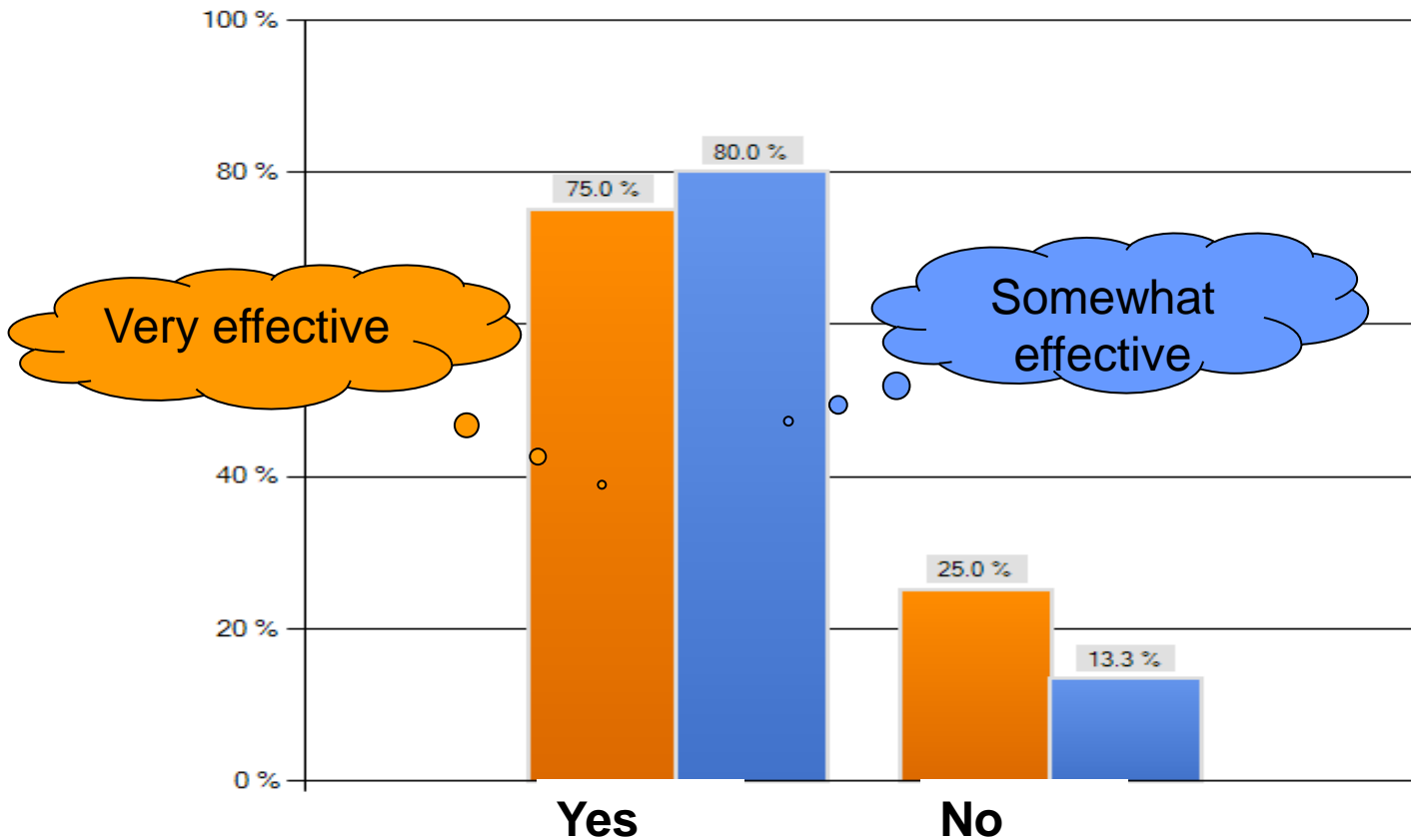
- involve partners in periodic updates ;
- have regular dialogues with partners about data; and
- regularly solicit suggestions for change.

All programs are likely to.....

- involve partners in initial selection of indicators.

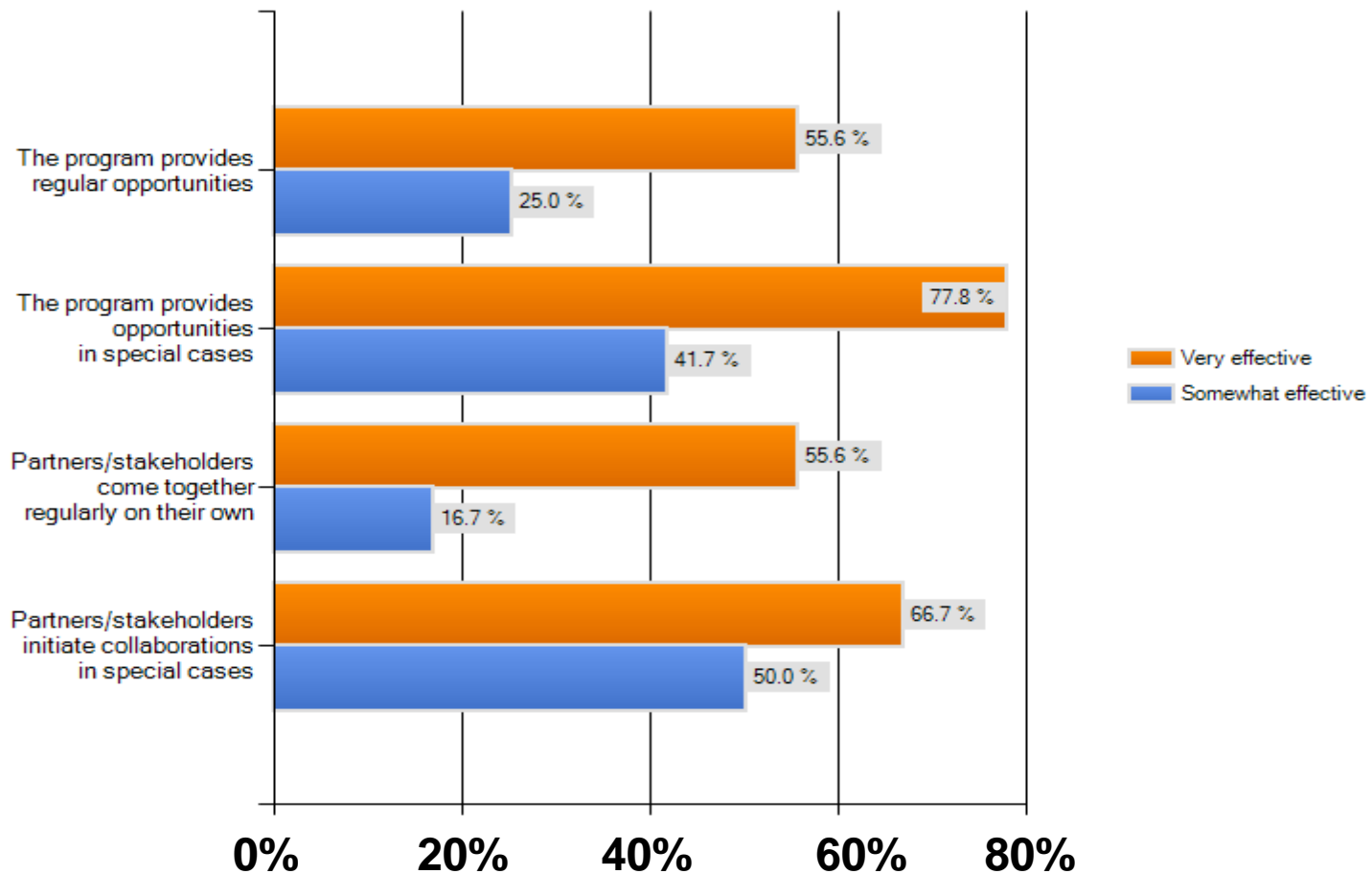
Both levels of effectiveness tend to encourage partners to collaborate.

Does your program actively encourage partners and/or stakeholders to use the information generated by the program in collaboration with others?



The more successful ones tend to do more types of collaboration.

How, specifically, do your partners and/or stakeholders collaborate using the data or analysis?



COMMUNICATION: Very effective partnering programs are more extensive users of.....

- interactive websites (67% vs. 27%) and
- gatherings (45% vs. 7%).

And they are more likely to communicate extensively or moderately by.....

- news feeds;
- social media (Facebook, Twitter, etc.);
- blogs; and
- memos.

But even with the very effective partnering groups, there's no silver bullet.

Of the very effective partnering groups -

- Half say they are very effective at engaging partner in indicator development.
- Half say they are very effective at engaging others in collaborations.
- One-third say they are very effective at communicating with others.
- One-third (of a small base) say their incentives or requirements are very effective.
- Half say they are very effective at improving community well-being.

Brian's Charge to the Panel (and Audience) – Tryens' Response

What utility can we realize from performance measurement, indicator reporting?

They can achieve their intended purposes, if we –

- get the terminology right!
- separate the two. Put civic leaders/universities in charge of indicator reporting and give governments the tasks of alignment and performance measurement.
- do our best to make sure political leaders find the systems useful.
- embed the government side of the work in a larger performance management framework.

Brian's Charge to the Panel (and Audience) – Tryens' Response

What data-driven change is possible?

If, as Brian asserts, successful programs are leadership dependent, then make hay while the sun shines.

- Katz and Stein did a lot of good.
- Maryland governor O'Malley is shaking things up with StateStat.
- NY mayor Bloomberg does vision-goal-targets with the best of them.

I would argue that Oregon and Portland (as well as Rogue Valley & Deschutes, Tillamook, Baker counties) are better off for having even their "failed" indicator programs.

Brian's Charge to the Panel (and Audience) – Tryens' Response

How much of our precious resources should be spent on:

1. Broad indicator measurement efforts –
Share the expense with all beneficiaries.
2. Program evaluation, performance auditing –
Between 5 & 10% of program expenses depending upon size and complexity (includes performance measurement).
3. Just spend all on service provision –
Better yet, just throw the money from helicopters while hovering over target populations that way you save on administrative costs as well.