Performance Measurement

A Guide for Agriculture and Agri-food Organizations

Ontario

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PREFACE

Performance Measurement Tailored for Agriculture and Agri-food Organizations: A Resource from the Ontario Ministry of Agriculture, Food and Rural Affairs

The Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) has a rich history of working with agriculture and agri-food organizations to grow the sector, strengthen Ontario's economy and create a business climate so our clients can attract jobs and investment.

Within OMAFRA, the Regional Economic Development Branch is a leading source for economic development resources and tools that are well known, highly recognized and extensively used across Ontario.

This guide provides a step-by-step approach to understanding, designing, measuring and communicating the performance of an organization. The guide introduces the concepts and the processes of performance measurement. It also includes scenarios in which the concepts and processes are further explained in mock organizational settings as well as templates and checklists to help you develop a performance measurement framework.

In recent years, private and public sectors have seen a shift in expectations around reporting. There has been a move from reporting on activities to reporting on outcomes. This requires more time and effort. However, the ability to speak to outcomes will better position your organization to secure the resources needed to deliver your initiatives and to meet your goals.

On behalf of OMAFRA, I hope this guide will contribute to the efficiency and effectiveness of your organization's endeavors by supporting your outcome-oriented performance measurement process.

Douglas Reddick
Director, Regional Economic Development Branch
Ontario Ministry of Agriculture, Food and Rural Affairs
July 2015

Acknowledgements

The development of this guide was based on a local, national and international literature review of performance measurement. In addition to a literature review, a jurisdictional scan was done to look at agri-food specific examples of measuring performance. One-on-one and phone interviews were also conducted and focus groups with representatives from key agriculture and agri-food organizations in Ontario were held. This work was primarily undertaken by MNP LLP Consulting and provided valuable material to form the basis for this guide.

OMAFRA would like to thank the following organizations and their representatives for their input into making this guide relevant to the needs of a variety of organizations.

- Agricultural Adaptation Council
- Agricultural Management Institute
- Alliance of Ontario Food Processors
- Ontario Agri-Food Education
- Ontario Dairy Council
- Ontario Fruit and Vegetable Growers Association
- Ontario Independent Meat Processors
- Ontario Livestock Alliance
- Ontario Soil and Crop Improvement Association
- Provision Coalition, the Ontario Food Industry Environmental Coalition
- Rural Ontario Institute
- Sustain Ontario
- The Ontario Greenhouse Alliance
- Wine Council of Ontario

The ministry will continue to work in partnership with organizations to keep this guide current and relevant to the diverse organizational needs.

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Introduction

Purpose of this guide

The purpose of this guide is to help agriculture and agri-food organizations begin to meet the growing expectations of their members, boards of directors, foundations, government and the public for evidence that demonstrates the effectiveness of their investments and support.

The agriculture and agri-food sector is a major contributor to Ontario's economy, contributing $34 billion to Ontario's gross domestic product (GDP). Applying best business practices, such as measuring outcomes to demonstrate value for money spent, is important to keep the sector strong.

This guide describes an approach to performance measurement that uses a performance measurement framework.

The guide shows how to develop a framework and how the framework can benefit an organization by providing evidence of the effectiveness of their initiatives.

Why organizations should use this guide

While many organizations in the agricultural and agri-food sector report on their programs and projects, some organizations experience challenges when asked to report on the outcomes of their programs or the impact of their work.

By using this guide, organizations will have the information they need to put a performance measurement framework into place. This will help them to identify, measure and report on the outcomes of their initiatives and provide the evidence of the effectiveness of their work.

Taking a purposeful approach to performance measurement will help foster a culture of continuous improvement within an organization that can lead to more successful outcomes in all initiatives.

Performance measurement frameworks are flexible. They can measure the effectiveness of a pilot project, a multi-year program or a strategic planning process and are applicable to a new or existing initiative.

Performance measurement: an overview

What is performance measurement?

Performance measurement is the ongoing process of collecting and analyzing data, and reporting the results. The results help assess initiatives to ensure desired outcomes are being achieved. Performance measurement is typically done by people within an organization to demonstrate accountability, to support decision making and to improve business processes.

What are performance measures?

Performance measures provide the information necessary to make strategic decisions about what an organization does and how it performs. Performance measures are also called performance metrics and performance indicators.

Performance measures let you know:

- How well an organization is doing
- If the organization is meeting its goals
- If clients are satisfied
- If processes are working
- When improvements are needed

"Would you tell me, please, which way I ought to go from here?" asked Alice

"That depends a good deal on where you want to get to," said the Cat.

From Alice in the Wonderland

Benefits of measuring performance

The benefits of measuring performance range from measuring the effectiveness of a single project to contributing to a culture of continuous improvement throughout an organization.

Using measures on a regular basis to make informed decisions, a plan can be corrected mid-course or priorities can be reset to take advantage of emerging opportunities. An internal performance measurement system will drive results and enable your organization to learn from its successes and failures.

Here are some of the other benefits:

- Gives insight on how to improve organizational practices
- Helps demonstrate and document changes in initiatives over time
- Informs the decision-making processes including budgeting and resource allocation
- Increases accountability by demonstrating the value of an initiative's activities in achieving desired outcomes
- Supports communication of achievements to stakeholders and the public

"However beautiful the strategy, you should occasionally look at the results."

Sir Winston Churchill

What is a performance measurement framework?

A performance measurement framework is a set of interconnected activities for the selection, development and implementation of performance measures. It details the approach to performance measurement, including output measures, outcome measures, methodology, roles and responsibilities, and reporting frequency.

Purpose of a performance measurement framework

The purpose of having a performance measurement framework is to provide a consistent approach for collecting, analyzing and communicating the results.

Developing a performance measurement framework

There is no one method for developing a performance measurement framework. However, a successful performance measurement framework requires you to focus on defining relevant and realistic outcomes and on using good quality data for your measures.

This guide takes a systematic approach to developing a performance measurement framework in the following four stages:

- Prepare for measuring performance
- Identify outcomes using a logic model
- Create performance measures
- Collect, analyze and communicate the results

Introduction to the performance measurement framework

The performance measurement framework details and documents your approach to performance measurement including the following:

- The interconnection between inputs, activities, outputs and outcomes
- The methodology
- The roles and responsibilities of those involved
- The ways used for reporting and communicating your outcomes

For a definition of how the terms input, activity, output and outcome are used in this guide, please refer to *Appendix 1: Glossary of Terms*.

The role of stakeholders

Involving key stakeholders has a number of benefits when developing a performance measurement framework:

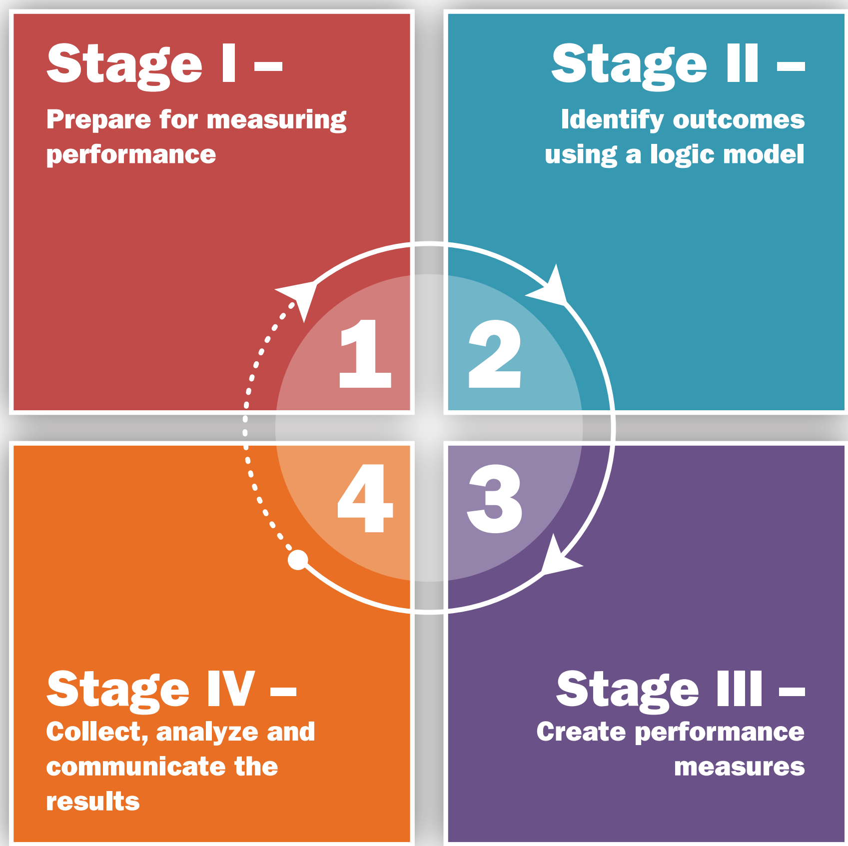
- It helps develop relationships and improves communication amongst stakeholders.
- It creates a sense of ownership for those involved in the initiative
- It ensures stakeholders work together to set goals, targets, check progress and increase awareness of achievements
- It fosters team work
- It builds a common language and understanding of the organization’s expectations, processes and terminology

Developing a performance measurement framework

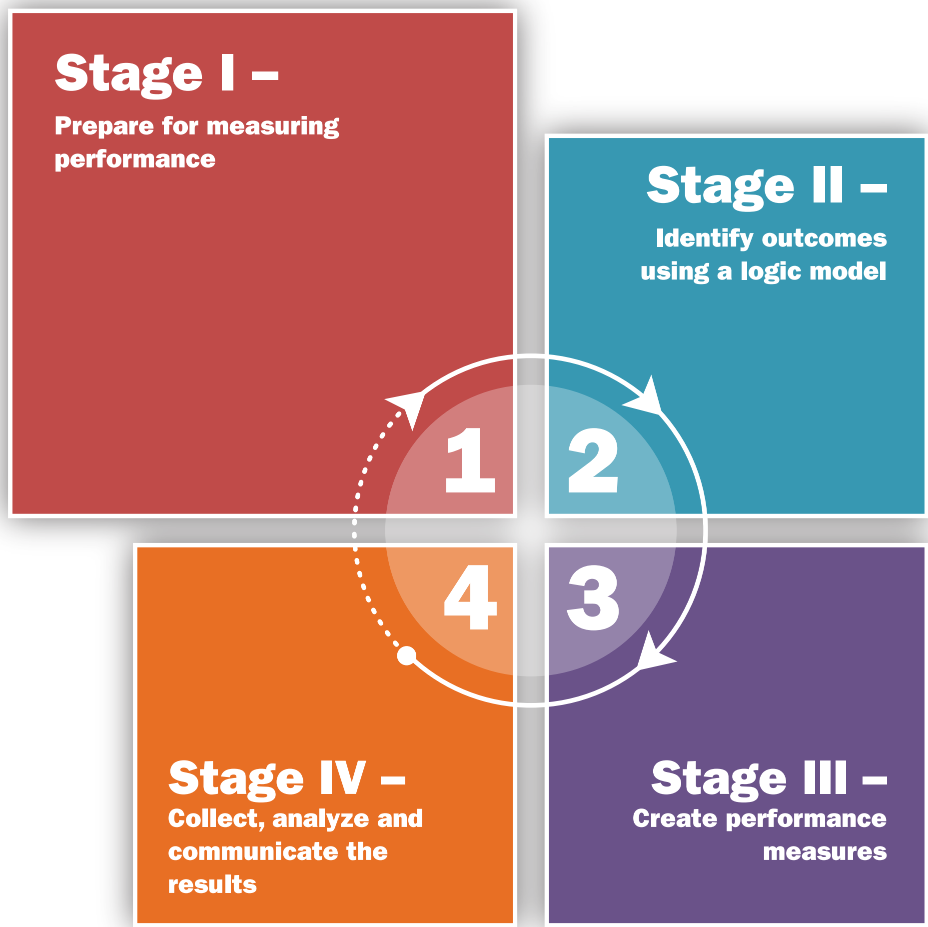
This section describes the four stages of developing a performance measurement framework, how they work together and how the results or outcomes can benefit your organization.

1. Prepare for measuring performance
2. Identify outcomes using a logic model
3. Create performance measures
4. Collect, analyze and communicate the results

Refer to *Appendix 3: Diagnostic Questions* to understand where your initiative or organisation is.



Stage I


Stage I –
Prepare for measuring performance
Stage II –
Identify outcomes using a logic model
Stage III –
Create performance measures
Stage IV –
Collect, analyze and communicate the results
1
2
3
4

Stage I: Prepare for Measuring Performance

In this stage, you will learn what you need to do to get a good start on putting a performance measurement framework into place. A good start means establishing common ground amongst your team regarding priorities. This requires engagement, understandability of the initiative and agreement on desired outcomes.

To prepare you will need to:

- Bring the team together
- Identify and engage stakeholders
- Decide what to measure

Bring the team together

You will need a team to help with different stages of the performance measurement process – it should not be placed on the shoulders of one person. Be sure to include those who:

- Work on the initiative that you are assessing
- Require the results
- Are familiar with collecting, storing and analyzing performance data
- Are familiar with report writing and/or communicating information
- Speak positively of the initiative and have a good working knowledge of performance measurement

Establish roles and responsibilities

It is important to be clear about the roles and responsibilities of each team member.

As you develop and put into place the performance measurement framework, together you will need to decide who is responsible for the different tasks. For example, who will be in charge of the following jobs?

- Ensuring that the performance measurement data are collected and analyzed
- Reviewing and assessing the data
- Gathering the information that will be used to write the report on the outcomes
- Submitting the report on time to the leader responsible for the signing off on the report

Involve the leadership

Engage the leaders of your organization at the start of the process to ensure their support for the framework. By involving them at the start, they are more likely to provide your team with the required resources and to help you maintain the momentum of the process. Having a strong champion in the executive office can be a major factor for success.

Identify and engage your stakeholders

Engaging your stakeholders is another important aspect of developing a performance measurement framework. Your stakeholders could be any person, group or organization that is affected by your organization's activities or has an interest in or expectation of the work you do.

Internal stakeholders

Internal stakeholders may include the leaders of your organization and board directors. These stakeholders may also be staff members who may or may not be directly involved in the initiative or the performance measurement process.

You may want to bring your internal stakeholders to the table early so that they are informed and can help. It is beneficial if they understand what a performance measurement framework is and the reason your organization is measuring a particular initiative. They need to agree on the desired outcomes, the actions to be taken to get there and the time and resources to be invested.

External stakeholders

External stakeholders may be your volunteers, members, donors or others who have an ongoing interest in your organization. There are benefits to bringing your external stakeholders into the process. As well, external stakeholders may have valuable insights about the work of your organization.

It is a good idea to consider a variety of stakeholders and their different perspectives. However, if your organization has a long list of stakeholders, identify those who are in the best position to contribute to the discussion. Consider their interests, their influence and their information needs.

Once the stakeholders are on board, take advantage of their knowledge and expertise. Consult them regularly to make sure you are on the right path. This will also help you maintain their support throughout the process. Their perspectives or participation can help strengthen the design of the performance measurement framework.

Decide what to measure

The performance measurement framework can be used to assess the effectiveness of an initiative, a pilot project or a long-standing program. Ideally, the goals or desired outcomes of the initiative will be linked to your organization's strategic plan.

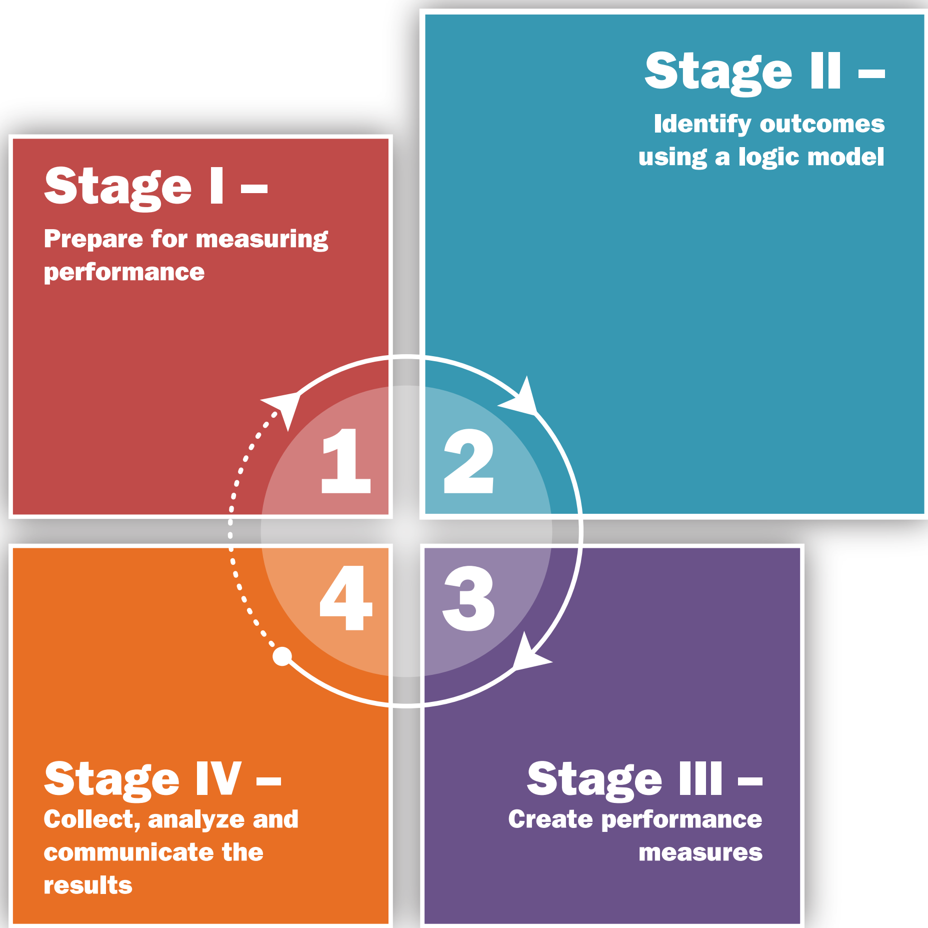
Reviewing your organization's strategic plan will help to develop your performance measurement framework, especially the outcomes. If your organization does not have a strategic plan, do not let it stop you from developing a performance measurement framework for individual projects.

Tip: Don't rush!

When given the job of creating a performance measurement framework, your first impulse might be to start working on a set of performance measures. Do your research first, prepare and identify your outcomes before you think of measures.

Performance Measurement Framework

Stage II



Stage II: Identify Outcomes using a Logic Model

There are three parts to explain this stage of developing a performance measurement framework:

- Part A introduces the concept of outcomes and why they are important
- Part B introduces the logic model, as well as the importance of the relationships and connections between inputs, activities, outputs and outcomes
- Part C describes attribution and how it relates to outcomes in a logic model

Part A: Outcomes

What are outcomes?

Outcomes are the actual effects of activities and outputs. They are the reasons why organizations started and continue to run initiatives. They are the desired changes on which organizations allocate resources, design activities and identify target audiences. Outcomes are written as declarative statements (i.e. jobs created) and are usually focused on the target audiences or external stakeholders.

To measure the value of an initiative, you must first decide what success will look like. That is an outcome. Outcomes are the changes, benefits, or other effects that happen as a result of work done. They can include changes in knowledge, skills, attitudes or practices of individuals, groups, organizations and even whole communities.

As your outcomes reflect the changes you expect to occur as a result of the initiative, they should be measurable. You should identify a few key performance measures to track your outcomes and determine whether or not they have been reached, in whole or in part. There is more about performance measures in Stage III of the guide.

Examples of programs and projects for agriculture and agri-food organizations

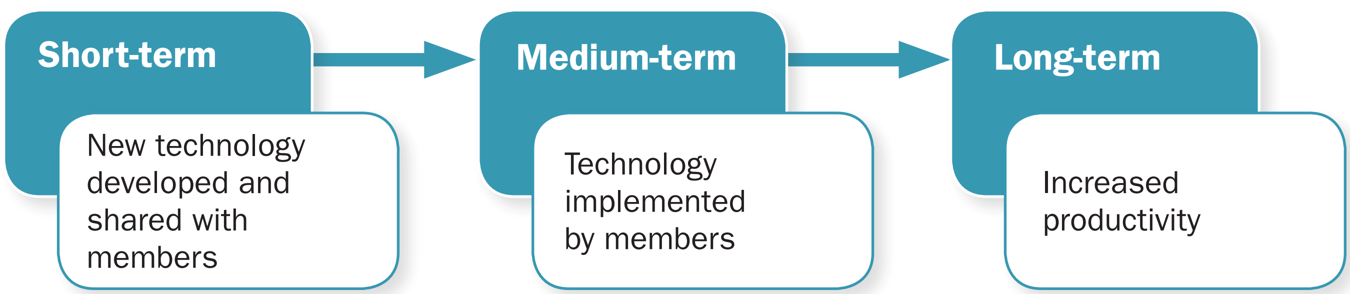
Agriculture and agri-food organizations have many functions. They may support research, provide advice, act as the voice of a sector in government discussions or provide learning opportunities for their members.

In *Appendix 4: Sample Outcomes and Performance Measures*, you will find examples of initiatives that might be relevant to your organization, such as marketing, education, advocacy and research. Each example lists possible activities, outputs, outcomes and outcome measures for each type of project.

The following table provides descriptions for some short-term, medium-term and long-term outcomes that could be expected from the activities and outputs of an initiative. As the table illustrates, the outcomes are linked like a chain, with the long-term outcomes resulting from the medium-term outcomes, which result from the short-term outcomes.

OUTCOME LEVEL	CHANGES
Short-term	Change in understanding, attitude, knowledge or skills of the target audience
Medium-term	Change in the behaviour or the decisions made by the target audience
Long-term	Changes in economic or health conditions, a benefit or consequence for the target audience and also for a larger audience (e.g. the local community, the province or the general public)

A chain of outcomes – short-term, medium-term and long-term outcomes
An example of an outcome change for research-related activities might be:



What you do and what you produce can influence the outcome. Long-term outcomes are usually synonymous with the goals of an initiative. For example, a long-term outcome for a training program about food safety may be that the risk of food-borne illnesses is reduced as participants adopt new practices for personal hygiene and handling food.

Direct and indirect outcomes

Usually outcomes are shown to be improvements or changes for those served directly by an organization, such as its membership.

Sometimes the work of an organization may lead to indirect outcomes to its membership, clients or the public. For example, the adoption of ideas by a number of the producers who attended your farm innovation workshop could lead to additional change when they explain the new technologies to their neighbours, who see the benefits on the farms around them and adopt the technologies.

Writing your outcomes

Here are some things to consider when writing outcomes:

- Define what specific terms mean for your organization. For example, if you use the term outcome interchangeably with benefit, impact or consequence, note it up front so everyone knows that
- Explain exactly what you mean. Try to avoid words that could be misinterpreted or misunderstood such as enhanced, innovative, sustainable, efficient, effective, excellent, high quality, stronger partnership. Think if, and how these outcomes can be measured
- Write your outcomes as simple declarative statements of what you expect to see on the ground as a result of your initiative. “Farmers adopt the newly improved varieties of wheat," and "farm gate income is increased.” are two examples of simple, declarative outcome statements. Use plain language and be consistent with the terms you decide to use
- Take time to clarify each outcome statement and what it means. If you fail to do this, then you may spend a lot of time debating your performance measures and could end up with measures that do not provide the information you need. A well-crafted outcome statement should make it easier for you to identify a performance measure
- When you finish writing your outcomes, put them in order of priority

Tip: Two questions to ask when writing your outcome statements.

The answers to these questions may help you think through what you want to say.

- Who is affected by the program, project or initiative?
- What will change or what will be new or different for your target audiences? This may include new knowledge or new practices.

Examples

Food processors (client affected) who receive training (outputs - services provided) increase their knowledge of personal hygiene best practices (outcome - change in knowledge)

- Food processors (client affected) with increased knowledge of personal hygniene best practices (outcome - changes in knowledge) make changes in their business (outcome - changes in behaviour).
- Food processors who make changes in their business (outcome - changes in behaviour) reduce risks associated with poor personal hygiene (outcome - benefits/impact).

Part B: The Logic Model

What is a logic model?

A logic model is a visual representation of the connections and relationships between inputs, outputs and outcomes. It serves as a road map for your initiative. It illustrates what activities you will undertake and the intended results using graphics and text.

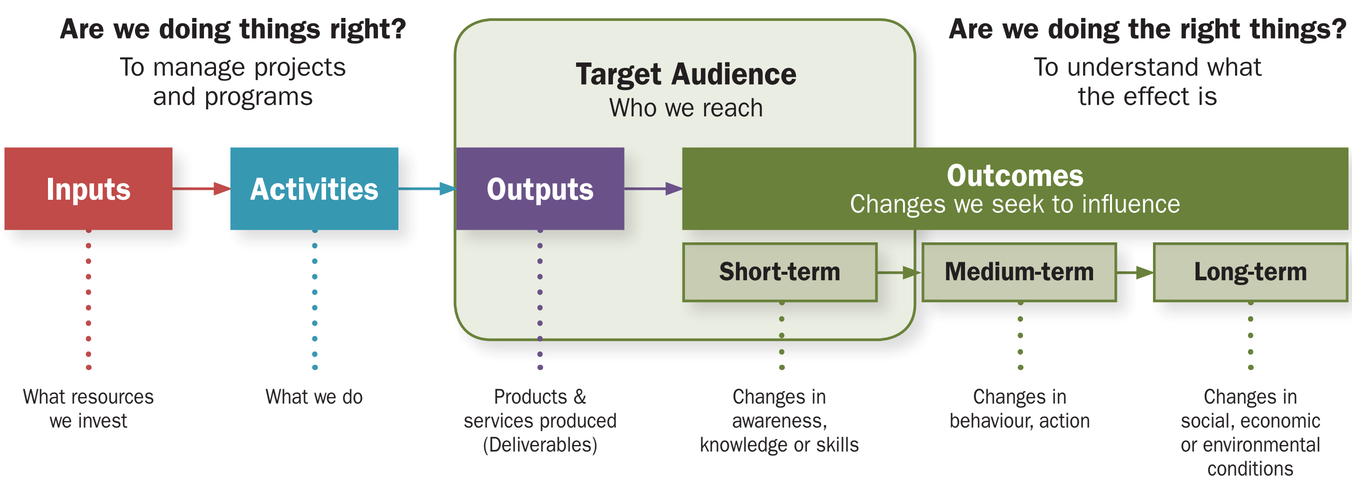
The logic model is flexible, meaning that if external factors come unexpectedly into play, the logic model can be adjusted. Logic models come in different formats but the basic information is the same as the information in the diagram below called Logic Model.

A logic model maps out the following:

- Resources/inputs
- Activities
- Outputs
- Outcomes (short, medium and long-term)

A logic model will help you focus on the causal relationship between inputs, activities, outputs and outcomes. It will also help you to determine whether or not the short-term, medium-term and long-term outcomes of your initiative are being realized.

Logic Model: Linking inputs, activities, and outputs to outcomes performance measures should help us decide



This logic model shows the important role it can play in helping us to describe the relationship between what we do and the changes we seek to influence.

The benefits and uses of a logic model

The process of developing a logic model can help you in a number of ways, such as the following:

- Visualize what is expected of your initiative
- Determine what is realistic and reasonable for the resources available
- Set priorities
- Identify appropriate performance measures
- Make it easier to communicate your results
- Provide a clear summary of what your initiative is working towards
- Determine the links between inputs, activities, outputs and outcomes

Two approaches to creating a logic model

1. Start with the end in mind – move from outcomes to inputs

a. Decide on the **outcomes** you want to achieve

Begin by brainstorming with the team about the outcomes you want to see on the ground at the end of the initiative.

Write them down and then refine them so that they are clear, concise and declarative statements.

When thinking about your long-term outcomes, and to some extent your medium-term outcomes, make sure they are within the scope of your initiative's influence. Although you may not be able to draw a straight line from one to the other, you should be able to show that your initiative contributed to your long-term outcomes.

Your outcomes should be connected to the vision and mission of your organization and should help you to communicate the importance and benefits of your initiative.

Group decision-making

If you have multiple outcomes, then you may want to narrow the field and measure what is important, rather than measure every possible outcome. One way to do this is to use a group decision-making process, such as dot voting. You write down the outcomes on a large piece of paper and you give each person involved five to ten coloured sticker dots. You ask them to vote by placing their dots next to the outcomes they feel are most important. They can place all their dots on one or spread them out. This will help show which outcomes are most important to measure.

b. Identify your **outputs**

Once you have identified your outcomes, you will be in a good position to determine what outputs you need in order to achieve the outcomes. Remember, outputs are the products or services you will provide such as brochures, guides, training sessions or public meetings. Many practitioners call outputs "deliverables".

c. Decide on your **activities**

When you have listed the outputs, you can then decide what activities you will need to deliver them. Remember, activities are the behind the scenes things that need to be done to produce your outputs such as writing a brochure and developing a training session.

d. Determine what **resources/inputs** you will need

After you have listed all the activities required for your initiative, then you are in a good position to identify what resources you will need to put them in place. Resources can include volunteers, staff members, consultants, equipment and money, etc.

Questions to help your team develop a logic model

COMPONENT	PROMPTING QUESTIONS
Long-term outcomes	• What is the current situation or problem that needs to be addressed? • What would the future look like if the problem was solved? • Who would be affected?
Medium-term outcomes	• Who or what practices/behaviours need to change and how?
Short-term outcomes	• What knowledge or skills do people need to make the desired change?
Outputs	• What product or service will you deliver?
Activities	• What do you need to do to get this product or service ready to deliver?
Resources/Inputs	• What resources do you need to do this work? • What other organizations might be involved?

2. Ask the why (or the if…then…) questions

Another way of working through the components of a logic model (inputs, activities etc.) is to identify the chain of events that lead to the long-term outcomes.

You can do this by asking questions that begin with the word why, such as the following:

- Why invest in training?
- Why is training important?
- Why is new knowledge important?

Or you may ask yourself **if**… **then** what happens questions.
For example:

- **If** a workshop is provided, **then** more food processors will have access to training that is specific to their needs (outputs)
- **If** the workshop covers the best practices of personal hygiene for food processors, **then** the participants will increase their knowledge about what constitutes good hygiene and create personal hygiene plans for themselves (short-term outcome)

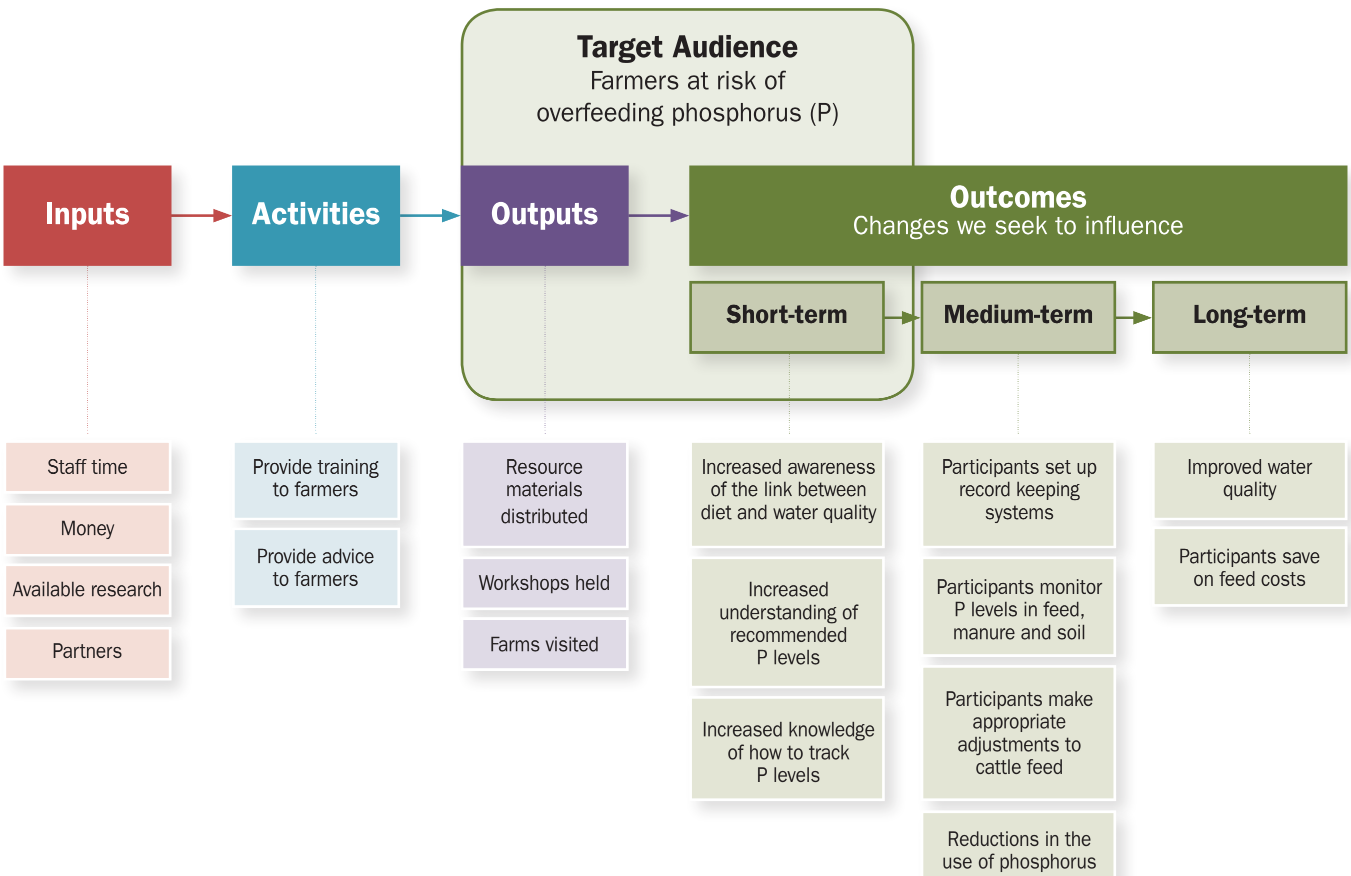
- **If** the participants create their own personal hygiene plans, **then** they will be more likely to put them into practice (medium-term outcomes)
- **If** more food processors put their personal hygiene plans into practice, **then** the risks associated with personal hygiene in food processing organizations will be reduced (long-term outcomes)

Building a logic model

Once you have written the outcome statements and listed your inputs, activities and outputs, you are ready to develop your logic model. In reality, as you build your logic model, you will probably refine your outcome statements and rethink some of the inputs, activities and outputs.

As mentioned earlier there are many different logic model formats. For example your logic model may be a table or a diagram. Your logic model may read from the bottom to the top or from left to right, as the diagram below does. For an example of a logic model that reads from the bottom to the top, please go to *Appendix 5:1 Logic Model Template.* You can adjust a logic model to meet your own needs.

No matter what format you use, your logic model should clearly show the relationship between the inputs, activities, outputs and outcomes. Ensure that for every activity identified, there is an output that connects to an outcome. There may be multiple connections and your outcomes may form a chain of short-term, medium-term and long-term outcomes.



Source: http://www.uwex.edu/ces/pdande/evaluation/evallogicmodelexamples.html
Appendix 2: Logic Model Tip Sheet is a two-page spread that you may find helpful when developing your logic model.

Test your logic model to make sure it works

You are now ready to test your logic model. Consider the following criteria:

1. Does your logic model include the key components – inputs, outputs and outcomes?
2. Is it relevant and representative – does it represent the purpose of the initiative?
3. Are the connections logical - is there an "**if … then**" or cause and effect relationship?
4. Are the activities, outputs and outcomes realistic, given the resources available for them?

Key points to remember when creating a logic model:

A logic model is not a product that one person produces on behalf of an organization. It is a multi-staged process that involves many people thinking and working together. Involve those whose work is represented in the model and those who have a stake in the outcomes.

Creating a logic model is a dynamic process with many revisions starting at both ends of the logic model as you test out your ideas. The information entered into the logic model at the early stages may need to be revised as new information surfaces.

A logic model is a simple one pager-placemat. It can be used as a communication tool and should be self explanatory. Include enough detail so it is easy to understand. You do not want a multi-page logic model. The details or rationale could accompany your logic model as appendices.

Sometimes you end up with more activities and outcomes than you can achieve with the resources you have. Discuss with the group or use a group decision-making process, such as group voting, to get to what is critical.

Here are two comments about logic models from those who have created them.

"It was a great opportunity to improve on previous programs by setting clearer expectations leading to increased accountability."

"Spending time to create a strong logic model with clear, realistic, and agreed-upon outcomes resulted in much less time spent developing performance measures."

Part C: Attribution and the Logic Model

What is attribution?

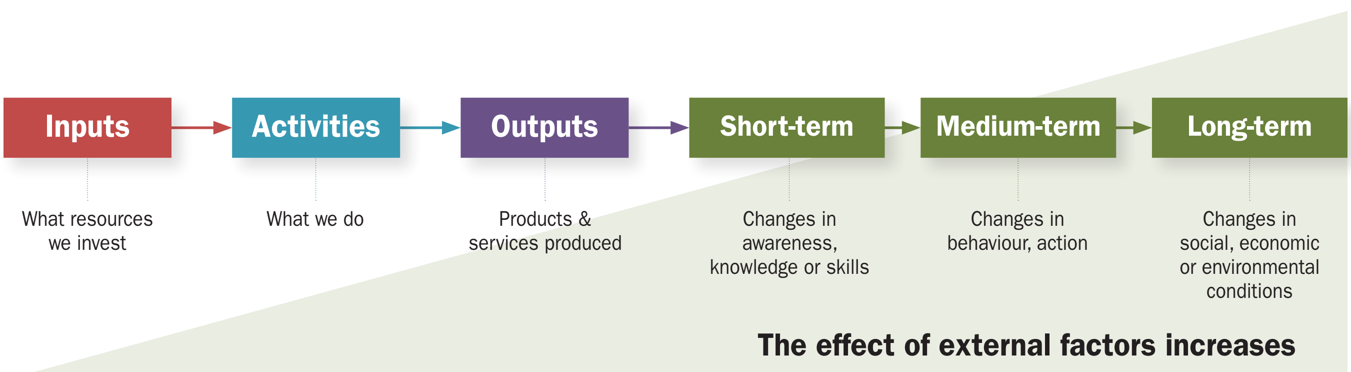
Attribution is the connection that can be made between specific actions and their outcomes.

In performance measurement, there are often long-term outcomes that organizations want to achieve, such as protection of farm land. Although external forces may make it difficult to attribute these long-term outcomes to your initiative, you hope that it contributes, at least in part, to the outcomes.

The logic model and attribution

In the following diagram, the inputs, activities and outputs on the left hand side are the components that are commonly associated with some level of control.

The outcomes on the right hand side of the diagram are the components of the logic model over which control gradually lessens but some degree of influence remains, even for the very long-term outcomes. These outcomes are the ones that are more likely to be influenced or affected by external factors over which your initiative has no control. External factors might include the influence of competing or supporting programs, incentives, changes in policy or government.

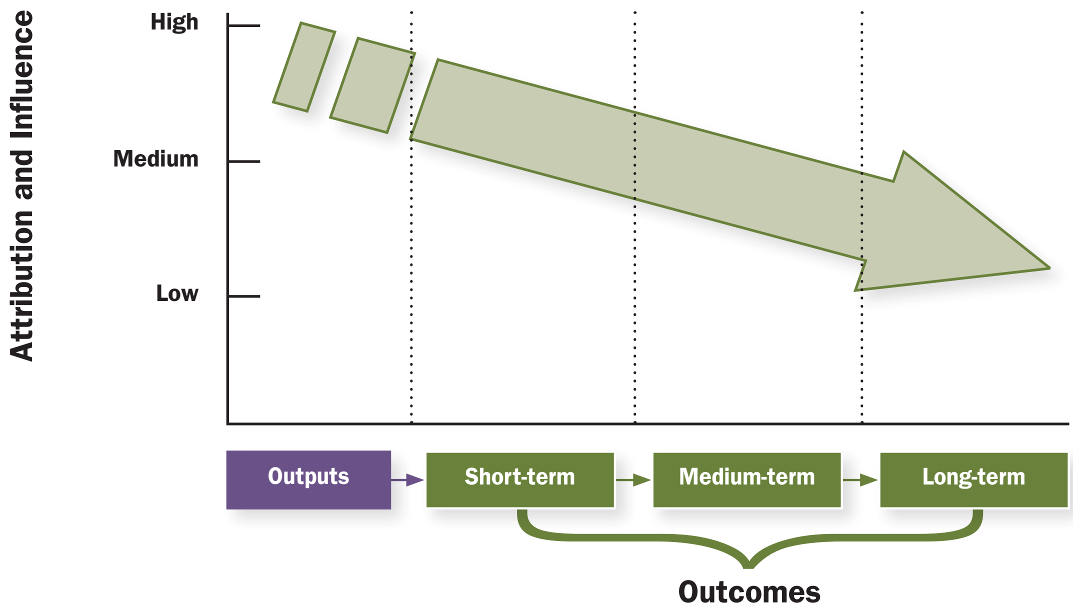


When developing your logic model, you may want to ask whether or not your outcomes are within your control or are influenced, at least in part, by the activities and outputs of the initiative. Another way of thinking about attribution is this: Would the outcomes have occurred as quickly or effectively without your initiative?

Your logic model should include long-term outcomes to capture the meaningful changes for beneficiaries and to reflect the full extent of the benefits of your initiative. You do not want to select outcomes beyond the influence of your initiative so that it is hard to measure and prove. For example achieving change within your clientele is more realistic than claiming change nationally.

Degrees of attribution

The degree of attribution or influence that your initiative has had on its outcomes can be categorized using the simple scale of high, medium or low.



This diagram highlights how organizations have a higher level of influence and greater ability to link the activities of their initiatives with the outputs and the short-term outcomes than with the long-term outcomes.

High or direct – This means that your initiative played a key role in the outcome. For example, your education project about a change in government regulation helped to increase members' awareness about the changes.

Medium or indirect – This means that your initiative played a supporting role. For example, your education project is one of a number of factors that may have influenced members to comply with a new government regulation. Also, your education project may not have reached every farmer.

Low or little influence – This means that your initiative is likely one of many factors that influenced a change. For example, your farm education project was not the only reason that the entire sector eventually adopted the new technologies. Some farmers might have used innovation funding or research grants to learn about and put the new practices into place.

Linking outcomes to attribution

At this point, you have read about outcomes, attribution and performance measurement and may wonder how they fit together. During the lifespan of your initiative, you will probably see the links between the inputs, activities and outputs and its short-term and medium-term outcomes.

You may notice, however, that you are not able to easily attribute the long-term outcomes directly to your initiative. That does not mean that it had no effect at all. It may have had some influence on the long-term outcomes or contributed to them.

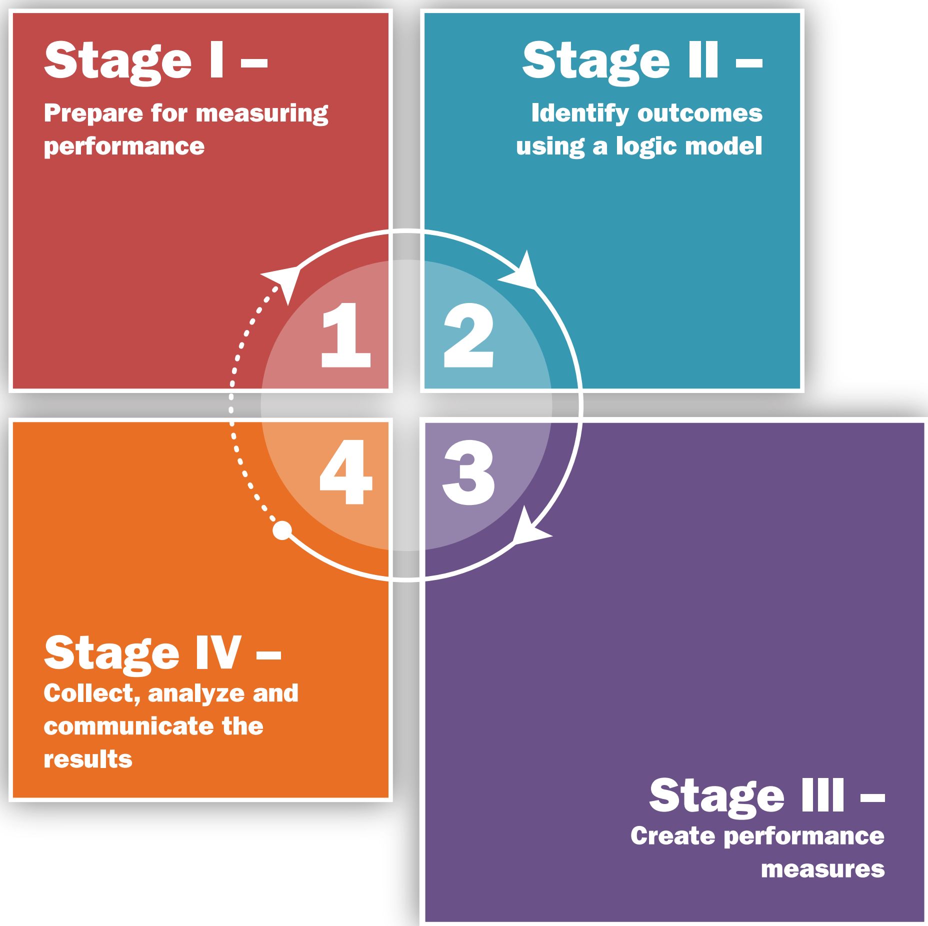
One way to make that link is by looking at the context in which your initiative operated and by acknowledging the other factors that contributed to the results. Your long-term outcomes were probably realized, at least in part, because of the hard work of many people working with other organizations on different programs with similar outcomes.

As you become comfortable with working with your performance measurement framework you will discover ways of linking or attributing the activities and outputs to the long-term outcomes. Be creative. Use narrative, success stories and anecdotal evidence to make the connection between the lower-level or direct outcome you achieved and a higher-level outcome. For example, if there are people who have said that your initiative was one of the reasons they changed a long-time agricultural practice and, if they agree to be used as an example, use their testimonial in your report.

There is more about writing reports and placing the results of your performance measurement in context in Stage IV.

Performance Measurement Framework

Stage III



Stage III: Create Performance Measures

To keep it simple, in this guide, the focus is on creating measures only for outputs and outcomes.

There are two parts to Stage III:

- Part A describes more about performance measures
- Part B explains creating performance measures

Part A: About Performance Measures

What are performance measures?

Performance measures provide the information necessary to make strategic decisions about what an organization does and how it performs.

They are quantitative and/or qualitative measures that are used to help organizations understand, assess, manage and improve what they are doing. Performance measures can provide an organization with important information on its results.

The results from measuring performance provide you with a reliable basis for assessing achievement or change over time. If you measure regularly, you can use the information to determine whether your initiative is on track. If it is not on track then you can use the information to adjust your activities based on what you have learned.

Performance measures are also important for telling the story of the initiatives. They are created to help answer questions you and others may have, such as the following:

- What activities were undertaken?
- How much was achieved?
- Were the initiative's goals accomplished?

Quantitative and qualitative measures

Performance measures are described as quantitative or qualitative based on the data needed to calculate the results.

Quantitative measures are measures that use numerical data. They are expressed as numbers, ratios or percentages, such as the increase in the number of members that participated in a workshop this year over the previous year. Increase in production per acre, farmgate receipts, exports, expansion, and job numbers are typical quantitative measures.

Qualitative measures are based on judgements, opinions and perceptions. These are expressed as non-numerical values. Qualitative measures are usually reported in the form of a narrative or story that explains the changes that resulted, in whole or in part, because of your initiative. These changes can include changes in behaviour or institutional changes and are often written as a comparison between two situations. They can also be expressed numerically. For example, you can calculate the percentage of people (numerical value) who were very satisfied with a workshop (opinion) as an indicator for the quality of workshop.

Both types of measures will help you to measure the progress of your initiative towards change. Data can come from a variety of sources including interviews, surveys, observations, reports or other written documents. There is more information on collecting data in Stage IV.

Measuring across the logic model

As mentioned above, you should create performance measures for the outputs and outcomes of the logic model.

By measuring these two elements, you create a unique view of the performance of your initiative that shows what inputs or resources are available and how they are being used. This will- help you assess the associated activities, the level of participation and the outcomes. This will give you a complete picture of how your project is doing and provide you with evidence of its effectiveness and the value it is creating.

Two Types of Measures		
Quantitative • Numbers ($) • Percentages (%) • Ratio (2 to 1)	and	**Qualitative** • Opinions • Testimonials • Case studies • Success stories

Measuring three elements of a logic model		
Inputs	**Outputs**	**Outcomes**
Tracking resources used to carry out activities	Measuring • quantity of products and services • who and how many people are involved • quality from their perspective	Measuring changes • in awareness, attitude, knowledge or skills (short-term) • in behaviour, actions or decisions made (medium-term) • in social, economic or environmental conditions (long-term)

If you are feeling confident in your data, you can use input and output or outcome data together in ratios as a means to report efficiency and effectiveness. For example, how much resources (inputs) are used to deliver a workshop (output) helps to measure efficiency. How the workshop (output) helps the participants to adopt a new practice (outcome) helps to measure effectiveness. By using more than one measure, you will help offset any perceived or actual weakness of one of the measures or any problems with attribution.

The point of performance measurement is to help reduce the uncertainty about the effect an initiative is having. Performance measurement is not intended to prove that it caused or contributed greatly to medium-term or long-term outcomes.

Not everything in the outputs and outcomes of the logic model needs to be measured, only those parts that you can and will do something about. Sample outputs and outcome measures for different types of organizational initiatives, such as those in education, research and advocacy are provided in *Appendix 4*.

Part B: How to Create Performance Measures

There are four steps to creating performance measures:

1. Brainstorm a list of potential measures
2. Assess the quality of each measure
3. Create a shortlist of measures and put them into order of priority
4. Define and document the requirements for each recommended measure

Step 1: Brainstorm a list of potential measures

Start with one output or outcome. List what it is you can record or count that would provide evidence of change. If you are unable to think of a measure, ask yourself, if the outcome was occurring, what would be different and how would you know? Performance measures help answer questions you or others may have about your outputs and outcomes. You may want to start with an output, as outputs are usually easier to measure than outcomes.

Another way to think about measures is to begin a sentence with the following phrases:

- The percentage of …
- The number and type …
- The extent to which …
- The before and after comparison of …
- The degree of change between …

When brainstorming, you should try to assign at least one measure for each of the outcomes, outputs and inputs of your logic model.

Appendix 4: Sample Outcomes and Performance Measures, includes examples of outcomes and measures.

Step 2: Assess the quality of each measure

One way to make sure that you have a good, solid measure is to use the SMART criteria for measures:

Specific – You are clear about what is being measured. The measure captures the essence of the specific output or outcome it represents, and the results can be attributed, at least in part, to the actions of your initiative.

Measurable – The measure has criteria that you can use for measuring and tracking, such as reliable data that are currently collected, readily available and relatively easy to report. You should be able to establish baselines for the measure so that you can monitor the changes.

Affordable – The data used for the measure should be affordable and within the budget of your program or project to purchase.

Reliable – The measure is based on reliable data that can be easily verified. The measure and its data compare the same things over time and the methods for analyzing and summarizing the results are clear and objective.

Timely – The data for your measure should be available when you need them – on a quarterly, annual or two-year basis.

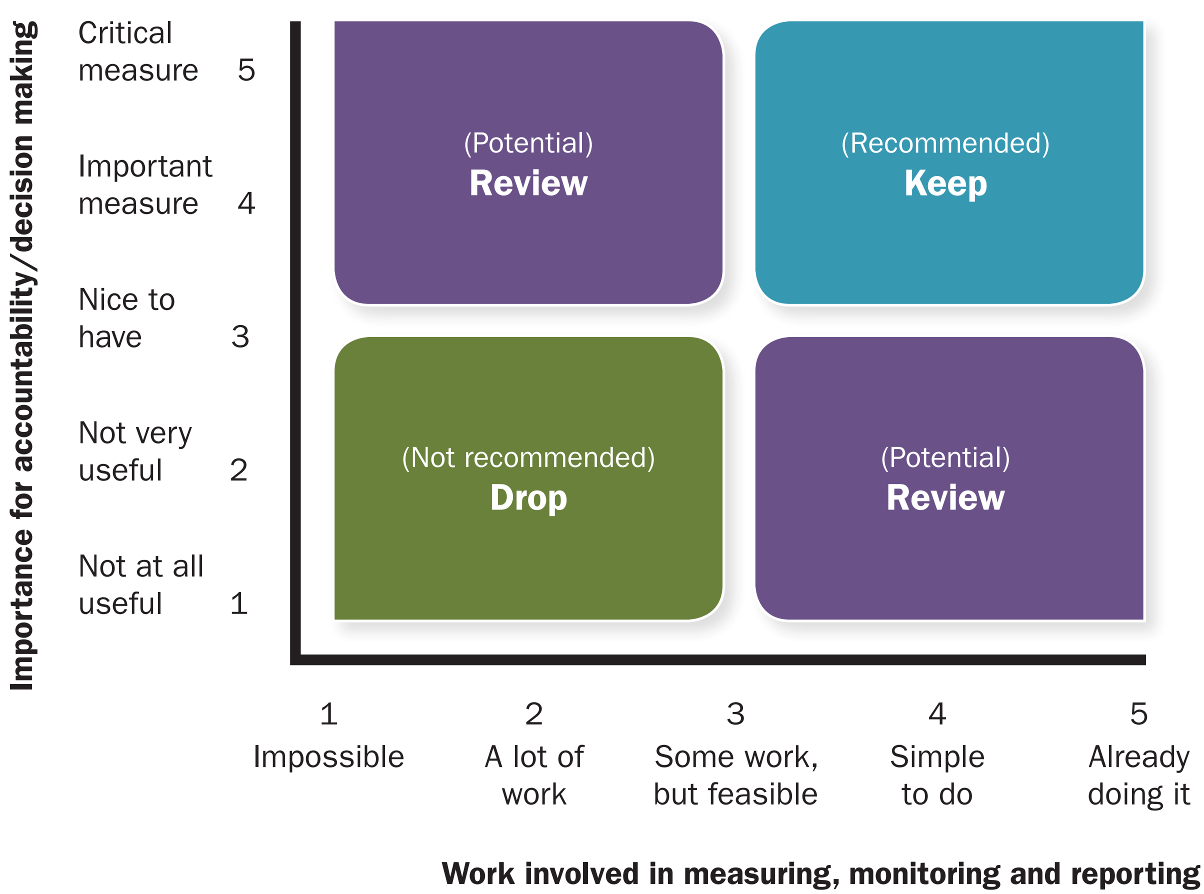
Step 3: Create a shortlist

When creating a shortlist, the first criterion is the importance of the measure for accountability and decision making. The second criterion is the amount of work and number of resources required to monitor and to report the measure.

By combining scores for both criteria, you will be able to identify and recommend the measures that score the highest. You will see the highest scoring measures are important for measuring accountability and, at the same time, do not require a massive effort of your part.

See the illustration below and *Appendix 5.2 Shortlisting Performance Measures Worksheet.*

Short-listing Measures



Step 4: Define and document the requirements for each measure

This is usually referred to as your performance recommended and selected measure methodology. In this step you document the details for each of the measures. This is a critical step. It ensures that you understand what is required to maintain consistency when collecting data and analyzing the results. A good performance measure methodology will also help you see whether or not your measures are feasible when you start working with them.

For each measure consider including information for each of the following elements.

Rationale for using the measure – Why are you using this measure? How does it demonstrate that your initiative is making progress towards the outcome?

Responsibility for data – Who will make sure that the data are collected and reported on, and who will do the collecting and communicating to stakeholders?

Sources of data and availability – What is the source of your data? How frequently are the data available – monthly, quarterly, annually? How reliable are these data?

Analysis and calculation – Who will analyze the data, and how will they make the necessary calculations?

Baselines – What is your starting point for the data used for this measure?

Targets or trends – How will you know if your initiative is successful? What is the target that your measure has to reach?

Appendix 5.3 Performance Measure Methodology Template will help you document the answers to these questions and other details about each measure.

Tip: Best Practice

A best practice is to note the limitations and assumptions in the output or outcome and in the measure and the data collected. For example, if you provide a training course on a new cropping pattern or technology, one measure you may have chosen is the response of the participants to the question, “Do you intend to implement what you learned at the workshop? For this measure, you have made the assumption that if they attend the course, then they will learn how to adopt the new technology or cropping pattern and will make changes on their farms.

However, the limitation here is that the participants are only reporting their intent to make the changes. They are not reporting on the changes they have made because of the course. Therefore you can only be reasonably certain that they will adopt the new technologies or practices.

But if you ask the same group the same question a year or two after the training, and a number of them report that they adopted the technologies or practices then you have solid outcome data that you can report and communicate.

Baselines and targets for each measure

Performance measures must be set with baselines and targets. A performance measure is only useful if the result is comparable to something.

A baseline is the starting point for assessing changes in performance and for establishing objectives or targets for future performance. Baselines are established with either existing data or after completing a cycle or two of measurement.

A target is a clearly stated objective or planned (desired) outcome, which may include outputs and/or outcomes to be achieved within a stated time. The actual result will then be compared to the target, which is what you hope will happen.

Benchmarking is the process of comparing organizational practices and performance over a period of time against a predetermined starting point. Later on, you may also want to compare the results of your program with similar programs from similar-sized or oriented organizations.

How to set targets

Five points to remember when setting targets:

1. Look at the baseline information as a starting point.
2. Search for evidence, history or experience with this type of program and target population within the organization.
3. Research the experience of other organizations that have run similar programs or projects. You are looking for information about comparable programs or initiatives.
4. Decide how much change or improvement is realistic to expect.
5. Set a date, if possible, for the target to be reached.

Whenever you set a target for an outcome or an output be specific about what has to change, when you expect the change to have taken place, and how much change you expect to see on the ground. You also want to note who will be involved in making the change take place.

A performance measurement summary

You may want to create a performance measurement summary. In a one-page table list your outputs or outcomes and your performance measures for each of them. Show the baselines and targets for the measures and who is responsible for each one. The summary will illustrate the story you tell your colleagues and managers about your initiative and show them how you will know when it is making a difference.

An example of setting a baseline and targets based on a previous year's performance

In 2014, the program ran eight workshops in total. In 2015, the baseline will be a minimum of eight workshops and a target of 10 workshops.

In 2014, 150 people attended the workshops. In 2015, the target for attendance is a 10 per cent increase over the 150 participants of 2014.

In 2014, the workshops had a 90 per cent satisfaction rating from the participants. In 2015, the target is to maintain that satisfaction rating.

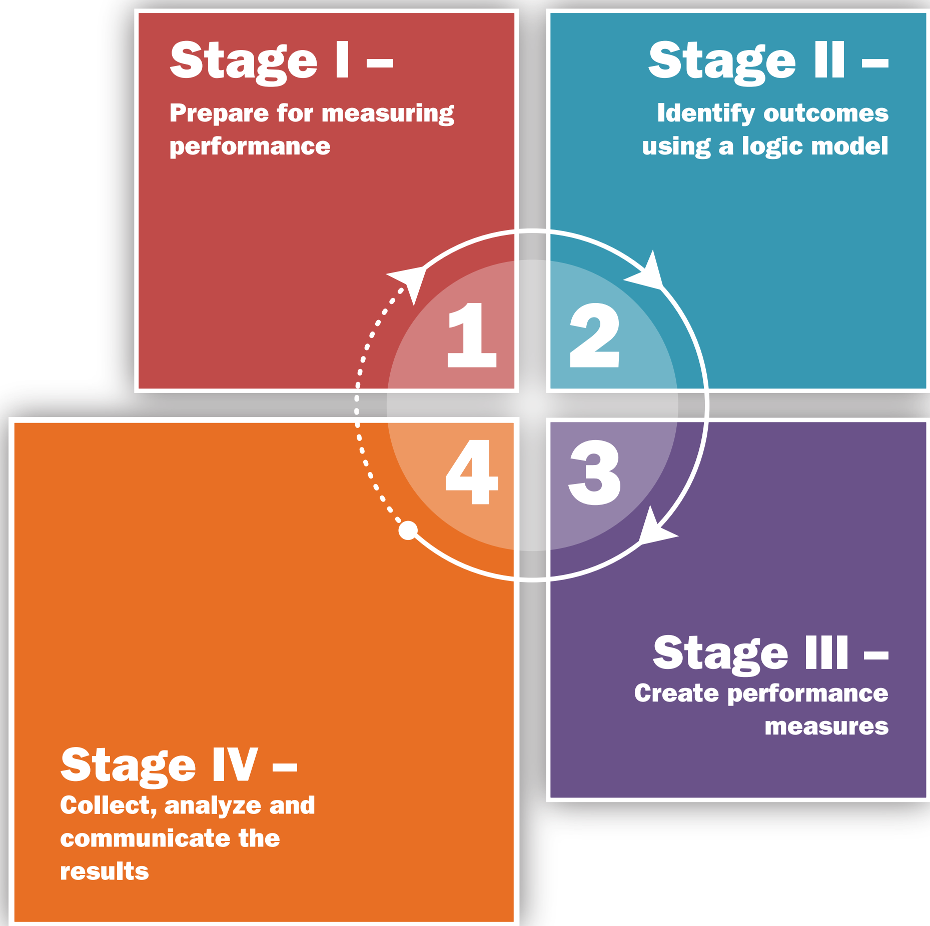
Tip: Have a conversation about targets

When developing a target have a conversation about the consequences of meeting or not meeting it.

- Most of the time, it is about communicating the results. How will you deal with the unmet targets, and who will be the spokesperson? Have your messages ready for both good results and not as good as expected results
- Remember, no one person is responsible for meeting (or not) a target so it is wise to discuss targets with those whose work is being measured to alleviate any fears
- Also be careful with tying incentives to results, as the practice might prompt unwanted behaviour, such as altering the results, to reach the target – especially in the early stages

Performance Measurement Framework

Stage IV



Stage IV: Collect, analyze and communicate the results

There are three parts to this stage:

- Part A discusses collecting and analyzing data
- Part B describes how to report and communicate your results
- Part C explains how to use the information you have gathered to improve your initiative

Part A: Collect and Analyze Data

Collect data

Data are the raw material for calculating results for your performance measures. Data are the simple facts, observations, statistics, numbers and records that relate to your initiative.

Tip: Be consistent

It is important when working with data and reporting results to be consistent. Try to avoid changing measures abruptly without making the appropriate adjustment.

Determine the data you need for each measure. Data may already be available in your organization or can be obtained from other sources.

Review data collected by your organization – Data collected by your organization will probably be available in documents such as reports, budgets, log books, minutes of meetings, media releases and backgrounders, annual reports and financial statements. Data collected, analyzed and reported for other initiatives can be valuable but may need repackaging.

Review data collected by other organizations – Data collected by other organizations are attractive because the information can cost little to nothing. The drawback is that you have no say in how frequently they are collected and reported. There are several sources of data:

- National i.e. Statistics Canada
- Provincial i.e. Ontario Ministry of Agriculture, Food and Rural Affairs
- Municipal i.e. MPAC
- Federal, provincial and municipal studies
- Evaluations of similar programs or projects from other organizations

You want to ensure that your sources of data are reliable and credible.

If some of the data you want are not readily available through other sources, then you may decide to find them yourself using observation, surveys, interviews or focus groups.

Observation – Observation is another way to gather information. Direct observation entails observing the procedures and work being done on site or the reactions to the work that has been done. Indirect observation allows you to gather information from secondary sources. If you attend a meeting, you are directly observing it. If you do not attend the meeting but review the minutes of it or a participant's notes, then you are indirectly observing it.

Surveys and questionnaires – Surveys and questionnaires allow you to sample the opinions, perceptions or satisfaction of a representative group of your members, program participants or general public. You can design the survey or questionnaire to collect the information that will be useful for one or more measures. Surveys and questionnaires provide an inexpensive way to ask questions and gather data for several measures at a time.

Interviews – Interviews allow you to gather information about your initiative through discussions with participants or stakeholders or the general public. Interviews may include a variety of open-ended and close-ended questions. Close-ended questions can be answered with a yes or no. Interviews can be conversational to collect a wide-range of information by asking open ended questions or guided by asking specific questions. You can also use a fixed-response interview in which you ask the people interviewed the same questions and provide the same set of alternatives as answers.

Focus groups – A focus group is usually a formal group discussion that is guided by a facilitator who has a set of questions. The ideal focus group is small as this helps keep the conversation flowing. Using a focus group allows you to collect data while gaining some insight into topics that can only be gleaned by watching and listening to members of a group interact.

The sources of information that you use to gather data will depend on several variables including what is timely, credible, available, and cost effective and provides you with the most useful information to measure your outcomes.

Don't immediately run out and buy a data information system!

There is no need to rush out and buy a data information and management system or some other software program. The spreadsheet and word processing software that you have on your computer is probably enough to collect the data and report the results for most initiatives. Wait until you are comfortable with the performance measurement process in general and your performance measurement framework in particular, before making an investment in a data information system.

Analyze data

The data collected may include numbers, facts, observations, statistics and records. By analyzing data, you transform the raw data into something meaningful for board directors, members of your organization, stakeholders or the general public to review and consider. You may want to present the data in ways that make it easier for your audience to understand the implications of what they are reading. This will also help them make decisions based, at least in part, on the data. Data analysis is the first step in reporting.

a. Look for patterns

When you analyze data, start by looking at them in ways that reveal patterns, trends and/or relationships. Sometimes patterns and trends emerge by themselves from the numbers or the responses to interviews. Other times you may have to create graphs, charts or tables to find the trends or patterns. Still other times, you have to work out percentages, averages or make other mathematical calculations to find the patterns or trends. If you have a statistician on your team or someone in the organization who is comfortable working with statistics this may be the opportunity for them to shine.

b. Convert quantitative data into graphs or charts

When you analyze quantitative data, you usually convert them into graphs or charts, or you apply statistical operations that demonstrate the importance of relationships between the numbers. For example, every month you might plot the number of hits your website receives to see whether or not a trend emerges over the year.

c. Explain qualitative data

In contrast, when you analyze and report on qualitative data, you will probably write a paragraph or two on what happened and the reason this is important. A combination of quantitative and qualitative data often creates a better picture.

d. Note interesting results

While you are analyzing the data, note any significant or interesting results – good and bad. Compare the results with the targets you have chosen for the measure and with the benchmarks. What you are doing is comparing the actual results with the intended or hoped for results.

For Example: An interesting result
If the number of farms owned by the organization members is steady over the last five years, but ownership is shifting towards younger generations of farmers, this could be a good indicator for a succesful campaign on succession planning.

Now you are ready to interpret the results and add context to them so that the meaning or importance of what you are reporting is part of your message.

Putting the analysis to work

a. Put the results into context

As you work with the analyzed data, you will start to put the results into context of your outputs and outcomes. The context may involve the validity and credibility of the information. If you have any concerns about validity and credibility, you may want to talk to the people who managed the data throughout the process so that any problems can be corrected quickly.

b. Make sure you can support the data and the measures.

The data and measures you use must be reliable and represent the outputs and outcomes being measured. Avoid reporting a single measure without the context or without other measures that bring understanding to what happened. For example, your association runs education programs for its membership and tracks the money spent on them. Generally speaking, this is a good investment but not if the training program presented was poorly attended. Were there mitigating circumstances that account for the poor attendance, at least in part?

c. Respond to Stakeholders' interest

When you think about context, imagine the questions that your stakeholders in the initiative might ask you about the results, for example:

- Did these results exceed your expectations?
- How do the results compare with the baseline and the target for the outcome?
- Are these results an improvement over the last set of results for the initiative – if such results exist?

Your stakeholders and members of your organization may also want to know if you consider the results a success, even if you have not met your targets. There could have been unexpected factors that influenced the results, such as a sharp contraction of the economy.

Different ways of looking at numbers

You can report a result in different ways, depending on the message you want to convey.

For example:

- A total of 450 members registered this year for the conference
- Almost 95 per cent of the members have registered for an annual conference
- There is a 22 per cent increase in the number of members who have registered for the conference this year over the number of members who registered last year

In addition, they may want to know whether or not the results will affect the initiative. Will you adjust any of the activities, such as putting more time and money into an activity that is producing unexpected but positive results?

Frequency and timelines for data collection and analysis

Data collection may be done at different times and with different frequencies depending on the type of data and the analysis required. You may receive some data such as operational and program data on an ongoing basis while other data, such as an annual survey will only be available once a year.

Below are three important points about collecting data with respect to frequency and timelines.

- Data are collected and analyzed over time as trends are more useful in understanding performance than points in time, and it takes time for changes to happen
- Results may be calculated on a different schedule than the schedule for reporting data
- Some of your measures will depend on data sets that are generated or updated less frequently, such as census data. In this case, you may have to wait for the new data to become available and make appropriate comments in your report

When you think about how frequently you are able to collect your data and report on it, you may also want to consider when you will present the results. For example, if you want your stakeholders to comment on the results and there is a date for the annual meeting, then you will want to have gathered, analyzed and reported on the results and sent them out in time for the meeting.

Part B: Report and Communicate Results

Performance measurement: An exercise in storytelling

A well-developed performance measurement framework allows you to tell a convincing story about the results of your initiative, backed by both quantitative and qualitative evidence.

Before you implement, communicate:

- What you want to achieve with your initiative
- Where you want to make a difference, and what your desired outcomes are
- What steps you expect to take as part of your plan to achieve these outcomes
- How you will know that you are on track to achieve the desired outcomes

After you implement, communicate:

- What is being achieved
- Where a difference is being made, and what the outcomes are
- What steps are taken to achieve these outcomes

If the story you create is well written, well-reasoned and backed by credible evidence and plausible assumptions, then it will allow you to make a strong case that your initiative is worthwhile for the following reasons:

- Stakeholders will understand the desired outcomes and why they matter
- They will feel confident that your initiative is well managed because its progress is being carefully monitored
- They will be able to see the change the initiative achieved
- They will see the return on investment

Tip: Communicate your results

You can communicate the results, or tell your story to stakeholders at meetings, on websites, in social media, newsletters and annual reports. Documenting and communicating the results of your performance measurement will help others understand what you are doing. It will also guide the work of those involved.

Getting ready

Before you release the performance results of your initiative, you need to sit down with your team and ask a few questions.

- Who will receive the report or information?
- What information or report will they receive?
- Why will they receive it?
- When will they receive it?
- How or where will they receive it?

When you have answered those questions you will know whether you have one audience or several audiences and what information each of your audiences will receive. This information will help you decide what types of reports you need to write and the stories you tell in each.

As mentioned in Stage I, there are two important questions that you may want to ask early in the process.

- Who will write the report or reports?
- Who will make sure that the information required for the reports is available?

Who will receive the information?

You and your team should make a list of all audiences both internal and external. Your stakeholders may be part of your external audience along with members of your organization, funders and interested members of the public.

Internal audiences

Your internal audiences include your team colleagues, the executives and the board of directors. You may want to include some of the key information in your main report in a high level executive summary or management dashboard of key measures. Or you may want to put some of the information in a PowerPoint or Key Note presentation for the next meeting of the board of directors or staff members.

You can write a shorter internal report for staff that includes the important data and measures so that you can track the performance of the initiative frequently and closely. You may want to structure these reports so that your organization can use them for follow-up or when staff is working on the next multi-year strategic plan.

External audiences

There is a range of possibilities for external reporting. You can incorporate parts of the main report into your organization's public annual report, if you have one. You can also take the information and write articles for your organization's newsletter or for a trade magazine. You can also incorporate the information on your organization's website or as a presentation at an event or workshop that your organization is holding. The important point to remember is to know your audience and to know what you want them to learn from your report – whatever form it comes in.

What information will they receive and why?

Once your performance measurement framework is up and running, information will come in regularly throughout the lifespan of your initiative. Although you may be keenly interested in all of it, your audiences may not. They may only want to know the information that most interests them.

Effective reports are tailored to provide the information at the level of detail that is suitable for the audience. For example, only some of your organization's board directors may know about the initiative. If you present your report at a board meeting then you will have to describe the initiative and results of the performance measurement framework in detail, providing additional supporting information, if necessary. The directors may all be interested in whether or not the initiative will meet its outcomes and, if not how that will affect the organization as a whole. In all likelihood, the directors will use the report they receive to make decisions.

You need to consider each of these factors when thinking about what information you give to each of your audiences and the reason you are doing so.

- What does this audience know about the initiative?
- How will this audience use the information?
- What do you want this audience to know and understand?

How and when will they receive it?

You will also have to decide how you will present the information – in a written report, a brochure, a section in the annual report or a special report to the board – and when you will present it?

If you decide to present the results at the annual general meeting, you will want to share the early results or a draft of the report with the board and senior executives as well as with the managers, staff and others who have worked on the program and on the review. It will help to create interest in the performance measurement process and it will give them a heads up about what is coming.

Structuring your report

This information assumes that you are writing the main report on the performance measurement process and your initiative. But, you can use much of what follows when you write reports for your different audiences. Articles for newsletters or your website are structured differently.

Start with the background

Tell your readers briefly about your organization and your initiative and describe what you are trying to achieve. The level of detail will depend on how much your intended readers already know. You also want to tell them or remind them about the goals or outcomes of your initiative and how they relate to the organization's vision, mission or strategy.

Describe the performance measurement process

In this section, you should explain the reason for the performance measurement process and briefly outline what was involved and the resources used. You may also give a short description of the performance measurement process and include the measures and data chosen and methodologies used. This is optional depending on how much the audience needs to know or is familiar with performance measurement.

Report the results and explain the context

When you write your report, you note the results and describe their context.

When writting the report explain the context by comparing and contrasting your results with the anticipated results or outcomes or with your benchmarks or targets. If the initiative runs over several years, you can compare the results captured this year with those of previous years.

If your results are mixed then explain the reasons for the shortfalls and describe what action has been taken to improve the results or what plans are in the works. You do not have to go into detail here about your plans, as you will probably explain them more fully later in the report when you describe your next steps.

Creating context begins while you are analyzing the data. You can gather much of the context for the report by discussing the results with people closely associated with the initiative, for example board directors, managers, staff or volunteers.

Do not be afraid of presenting a real and unbiased picture of your progress. By talking about results that are less than stellar and your plans for improving them you increase the credibility of your report, initiative and organization.

Graphs, charts and tables

This is where you make strategic use of graphs, charts and tables to tell your story. Usually, graphs, charts and tables provide information to monitor progress and help with the decisions to be made. Be sure to explain their context and what they are showing. Do not assume your readers will know what a chart is showing simply by looking at it. Without your explanation, they may interpret the results incorrectly.

- Talk about the relationship between the activities, outputs and outcomes and how the first two contributed to the outcomes
- Discuss the difference between the planned outcomes and the actual results
- Interpret the results by talking about what they mean
- Include the factors that may have affected or influenced the results
- Comment on an unexpected or unintended positive or negative consequence of the initiative
- Identify limitations to using or interpreting presented data, e.g. you have data but you can not say whether or not the outcome or output was successful without additional information

Describe your next steps

Once you have described the project and presented the results, you then outline what action you plan to take to improve the results or to capitalize on them. What you are doing here is demonstrating that you are using the information gleaned from the performance measurement process to make improvements going forward.

You may offer recommendations to improve results or describe what has already been done. This is also where you would include any action that you require from your readers or audience

Tip: Don't over promise

On your own, you may not be able to explain the reasons for the results in detail, their context and what they mean at this point, or what your next steps might be. A discussion with your executives and/or board of directors may provide some direction. You may also want to discuss any barriers or concerns that have to be dealt with in order to improve the results.

Acknowledgements

In this section you acknowledge the work of those who are involved in the initiative and your team members on the performance measurement review. You also give credit to any partners who contributed to the results and acknowledge any relationships outside your organization.

Tip: Test your report before releasing it

Before you release your report, ask staff members who are involved in the program to read it and provide comments. You want to know if it conveys the story and is easy to read.

- What captured their attention?
- Are the results reasonable and understandable?
- What is missing from the report?
- What is in the report that can be cut out?

Consider their feedback, make the changes that are necessary.

Writing newsletters, articles, web-based stories and annual reports

Now that you have written the main report, describing the project and the performance measurement process in some detail, you can use blocks of it to present the information to your different audiences.

Communicating your successes

Reporting and communication are intertwined. Your report is an excellent way to let people know about your achievements and to build trust in your activities. Keeping stakeholders informed of your progress will help to secure future support and strengthen stakeholder partnerships. As mentioned above, the information in your report can be communicated to different audiences and for different purposes. There are many ways to reach your targeted audiences. Use all communication channels.

- Think beyond your own website. Are there associations and partners who might be willing to post your report or provide a link to the report from their websites?
- Use various media channels. This might include social media such as LinkedIn, Facebook and Twitter as well as local and regional newspapers, radio and television stations.
- Talk about your success. Encourage your senior management and board directors to include information in their speeches about the report and your successes.
- Attend public and stakeholder events. Talk to those attending about your progress and make the report or a highlights document available.

Part C: Using the Information

The benefits of your performance measurement process start to surface when you sit down with your team and leaders of your organization to make decisions about the future of the initiative. The results of the process should provide a reliable base of information to use when formulating new plans to help achieve its outcomes.

The results of a performance measurement process provide much needed information for decision makers but do not replace the need for leadership, financial data, common sense, and good management or knowledge of a program.

What to look for in the results

Your performance report should invite questions and generate discussion about continuous improvement. As your performance measurement results will not provide ready-made answers about what should be done, you may want to ask the following questions about your initiative.

Performance measurment results should provide answers about:

- What is or isn't working?
- What opportunities are there to improve the initiative's performance?
- What challenges need to be investigated?
- What should be the focus of attention at this point?
- What decisions can be made based on the new information?
- What is likely to happen if changes occur or not?

Later, as more information is gathered over time and longer-term trends become available, you may want to ask the same or similar questions about your initiative.

You may also want to learn from and consider the reasons your initiative has met/not met some of its targets or outcomes, for example:

- Did you have the appropriate resources, time or staff to devote to it?
- Did the priorities in your organization change and did this affect your initiative?
- Did the staff available have the knowledge, skills and experience to do their jobs effectively?
- Were the processes out-dated or difficult to understand or follow?
- Were your expectations or outcomes unrealistic given the time, staff and resources available for the program or project?

This is also the time to discuss all the possible changes you can make to improve the results. Make a list and examine each of the possibilities before making your decisions. Before you start, decide what works and leave it alone for the time being. Then you may want to consider the following points:

- Look at what needs to change in order to improve the results
- Look at what activities, outputs and outcomes can be altered or realigned
- Make a list of the activities, practices or strategies that may be dropped
- Write down possible new outcomes, outputs or activities
- Write down the issues that came up during the performance measurement process that may need further discussion

Whatever your decisions about the future for your initiative; do not forget to communicate your achievements and your successes to your stakeholders, staff, members of the organization and general public.

Tip: Don't be too quick to make changes to improve results

After you report your first results, you may think you should leap right in and start making changes in measures or methodology to improve the next set of results. Hold on. It is usually a good idea to wait until you have one or two more sets of quarterly results to see what the trends are, if any. This will also give you the time to discuss the results with your colleagues, managers and board members and agree on any potential large scale changes to the initiative.

Closing thoughts

Here are few reminders about the process of performance measurement:

- Get people involved, those whose work is represented and those who decide what work is to be done
- Make sure you are clear about the outcomes of your initiative
- Let people know what is expected for each of your measures to maintain the integrity of your data
- Use more than one measure to communicate results
- Try to include measures that are important to tell your story
- Make sure your measures fit together to tell a complete story and provide the information required to make decisions
- It takes time to create the right measures so be prepared to review and revise as necessary to suit the needs of your organization

For a checklist of questions that you can ask yourself at each of the four stages of putting performance measurement into action, please refer to *Appendix 3: Diagnostic Questions.*

A final word; always work towards creating the best measures to manage the initiative, to make improvements, to meet the expectations of the decision makers and to tell the story. Be practical, it has to work for those responsible for getting it done too.

Performance Measurement Scenarios

Performance measurement scenarios

This section of the guide includes three scenarios based on the activities of two fictional organizations that are putting performance measurement into action.

Scenario 1 describes a non-profit farmers' organization that develops a strategic plan with performance measurement built into it. The plan is based on the organization's vision, mission and goals.

Scenario 2 outlines how the organization in Scenario 1 uses a performance measurement framework in an educational program that it developed to help its members with new regulations for cleaning equipment.

Scenario 3 is about a local food group and shows how performance measurement can be used by a group of individuals working together for a common purpose. In this case, it is to promote the use of locally grown produce.

These three scenarios demonstrate the step-by-step approach required in developing a performance measurement framework, including the need to keep engagement and communications going throughout the process.

The scenarios shed light on a small number of outcomes. The actual number of outcomes and related measures in your organizations performance measurement framework would depend on the initiative you are measuring.

The performance measurement scenarios section also includes seven templates and charts to help you work through the process. Note that for the purposes of illustration, these examples have been simplified. You might require more detail for your logic model and descriptions of measures. Not all templates have been filled out for all scenarios.

Scenario 1: IronOats Farmers of Ontario (IFO)

About IronOats Farmers of Ontario

IronOats Farmers of Ontario (IFO) is the province's only independent, member-based, financially sustainable, technically resourced, cereal producer organization.[1]

The organization represents more than 8,000 growers of corn, oats, barley and wheat. IFO is a non-profit organization, incorporated in 1989, with the primary purpose of promoting the interests of all aspects of cereal production in the province. The organization works to make a more efficient, sustainable and profitable cereals industry for all Ontario cereal producers.

IFO works closely with its producer members to ensure accountability, transparency and value-for-money in all of its activities and initiatives, including its board governance. The organization is governed by a board of directors that sets priorities for staff and committees. The board includes a full-time president, a volunteer chair and eight directors.

[1] This is a fictitious organization.

From the beginning, the organization has operated with a clear vision and goals and has put a variety of initiatives into place. However, IFO has never looked at the effect these initiatives have had at helping the organization achieve its goals.

Prepare

In early 2014, IFO elected a new president. The organization had been struggling financially for the past several years. Consequently, the president's first assignment was to put IFO on firmer financial footing.

He began by identifying the organization's goals in the medium and long-term, how it was going to achieve these goals and the process it was going to put into place to determine whether or not the goals had been achieved. The president decided that a strategic plan that included performance measures would be the framework to make this happen.

The new president was a seasoned leader, having served as chief executive officer for a non-profit general farm organization for 10 years prior to joining IFO. He was aware of the challenges he faced mobilizing the board chair and directors to embark on a strategic planning process. Nevertheless, he introduced the idea to the board and IFO staff at their monthly board of directors meeting. He emphasized the necessity of focusing the work of the organization and ensuring that it was meeting its objectives. He reminded the board and staff that the organization had been involved in a multitude of projects, several of which seemed only marginally aligned with its mandate. As the directors were keenly aware of the IFO's fiscal constraints and the need to target the organization's work more strategically, they were open to the president's recommendation to develop a strategic plan that included a performance measurement process.

It took another two meetings of the board and a meeting with IFO members at their annual general meeting to gain approval to proceed and to establish the work plan for a strategic planning process.

Given IFO's limited resources and its size, the board directors decided to develop the strategic plan in house, using IFO staff and resources. The directors agreed that implementing the process themselves would be an opportunity to learn more about the organization and to build capacity among the board directors and IFO staff.

After obtaining their buy-in and cooperation, the president set out to work with the board to confirm the goals and objectives of the organization.

The board directors quickly reached a consensus on the organization's vision – to promote and enable an efficient, sustainable and profitable cereals industry for all Ontario cereal producers.

To achieve this vision, the board identified four specific areas of focus:

- Product information and education
- Industry promotion
- Advocacy and policy development
- Research

Identify outcomes using a logic model

Once the board had established the organization's strategic direction, the president wanted to be able to report to the members of the organization.

The first stage was to define and document outputs and outcomes the organization wanted to achieve in each of the four focus areas.

The board directors worked with IFO staff to create a logic model in a table form that showed the outputs and outcomes for each of the four focus areas described in the strategic plan.

This table is called *IronOats Farmers of Ontario Logic Model* on page 52.

Create performance measures

After reviewing the logic model, the board directors decided that the best way to tackle performance measurement was one program at a time. This meant they would not create a performance measurement framework for their whole strategy but rather for some components. They opted for Product Information and Education. There were many reasons for choosing this program and there were two in particular.

First, the organization had already considered extending an education program designed to help producers prepare for a forthcoming change in regulations. Second, the government recently announced that funds would be available for such education programs provided the program included outcome-based performance measurement for reporting purposes.

Although they were still in the process of developing performance measures for the strategic plan, IFO staff members began to create similar measures for the education program. They wanted to take advantage of the new funding.

How IFO staff applied the four stages of a performance measurement framework into place is the subject of Scenario 2.

Scenario 2: The Education Program of the IronOats Farmers of Ontario

Introduction and background

The 8,000 members of IronOats Farmers of Ontario (IFO) are facing new regulations that will require producers to update their processes for cleaning their equipment.

Once the regulation is in force, producers have one year to comply and switch to the new processes.

Research results showed that a new process using less harmful chemicals would provide the same level of protection as the processes IFO members had been using for years.

Prior to the regulation changing, IFO participated in consultations about the new regulation and maintained an information section on its website during the consultations. Updates and educational material on the new processes have continued to be posted on the website and in their monthly newsletter. Feedback from members suggested that they were able to accept the new regulations.

To help IFO member producers prepare for the new regulation, IFO staff wanted to expand their education program using performance measurement to ensure success of their program and to demonstrate the effect of training on the rate of compliance of the members of IFO.

Prepare

As part of a much larger effort for organizational performance measurement, the board decided earlier to try performance measurement on a smaller scale. The chose the education program as there was a sense of urgency in getting the producers prepared for the new regulation. As well, there was a chance to qualify for additional resources to get the program up and running.

The board proposed that IFO members were offered training on the new regulation and on how to comply with its requirements. A project team was formed to develop material and figure out the best way to provide the training.

Having endorsed the project, the board directors asked the project team to do the following:

- Develop a strategy to help member producers prepare for the change in regulation
- Create the logic model
- Design a performance measurement framework that would identify measures, targets, accountability and reporting

After their first meeting, the project team decided to draft a program profile to explain the proposed education program and training to IFO members. The project team came up with the following objective.

- The program aims to make IFO members aware of the change in regulation and to educate them on how to comply with the regulation for cleaning equipment. In the long-term, this education program should help ensure IFO member producers comply with the new regulation and improve food safety

The project team presented the plan for the education program at the annual general meeting with a view to finding out whether or not IFO members would be interested in attending workshops. The project team received positive feedback.

The board decided to provide the project team with enough money to hold two, three-hour workshops in each of IFO's four regions.

The board set the budget for the education program and asked the project team to report back on the progress they made in educating IFO members.

Identify outcomes using a logic model

As the project team discussed the content of the training, they quickly saw that it was not clear what the end results or the outcomes were supposed to be. What exactly did they expect the people attending to learn and to do?

They decided this education program had two major goals or outcomes:

- To increase IFO members' awareness about the regulation
- To help members adapt to the changes and comply with the regulation before it came into effect

The question remained, how would the project team know if the training made a difference? After all, by law the producers had to make the changes to their processes for cleaning their storage bins and equipment to comply with the new regulation.

In the end, the project team decided that compliance with the regulation was the ultimate outcome even if they could not prove that IFO producers complied only because of the education program.

When the project team updated the board on their progress, some of the board directors were skeptical about the connection between workshops and how quickly IFO's member producers would comply. As one board director remarked, "It's not like they were directly responsible for farmers complying with the regulation!" In response, the project team decided to use performance measurement to explain how they would know if their education program had helped to improve compliance.

A solid link between their work and improved compliance was needed. This meant the project team needed to map out exactly what they were going to do and what they wanted to see happen. They developed a logic model.

Please go to the *IronOats Education Program Logic Model* on page 54.

Note: A logic model can be built in different formats. This scenario has provided a logic model in the form of a table for the organization's strategic plan (see page 52) and a logic model in the form of an illustration for the education program (see page 54).

Create performance measures

The project team met to develop a list of performance measures to track its progress towards ensuring the majority of IFO membership would comply with the regulation before the end of the transition period. The project team listed all the measures they could think of that could measure the success of their project. They ended up with a long list.

The team then filtered the measures by looking at the importance of the measure and the amount of work involved in collecting the data. Using a rating system they came up with a list of five measures that could be used to measure the performance of the education program.

For an example of how to shortlist your measures, please go to *IronOats Education Program Shortlisted Performance Measures* on page 55.

After sharing and obtaining approval from the board, the project team developed a performance measurement framework and started to discuss how best to collect, track and report on their measures. They created a methodology table for each of the measures. The table required the project team to decide among other things who on the team was responsible for the outcome being measured and who would collect and analyze the data and it would this be done.

To see their methodology for one measure, please see the table called *IronOats Performance Measure Methodology for One Measure* page 57.

Note: When working on your organization's initiative, you would need to write up a separate measurement methodology for each measure. If you need to inform others about the results of your performance measurement process, then you may want to write a short report outlining the results to date and explaining how you arrived at them.

Collect, analyze and communicate results

In addition to developing the workshop, the project team also created a follow-up survey to be completed by participants at the end of each workshop session.

Right after the first session, the project team began tracking the attendance at the workshops and the results of the follow-up survey in MS Excel. When they reviewed the results they saw that although almost all the expected producers attended and were generally satisfied with the workshop, there was some feedback about the day itself.

When asked what was the one thing the participants wanted to see improve in the session, the overwhelming response was that it was too short and there was not enough time to ask questions at the end. The project team decided to extend the next session to four hours to see if that helped. They continued to monitor the results and saw improvements in the knowledge of participants once they introduced the Q&A session and created a handout of the answers.

About the time half of the workshops had been presented, the board held its mid-year meeting. The project team presented the board with an update report.

IronOats Farmers of Ontario Logic Model

Product information and education – We strive to be the primary source of information for the industry and a credible source of education and training for our members and the industry.

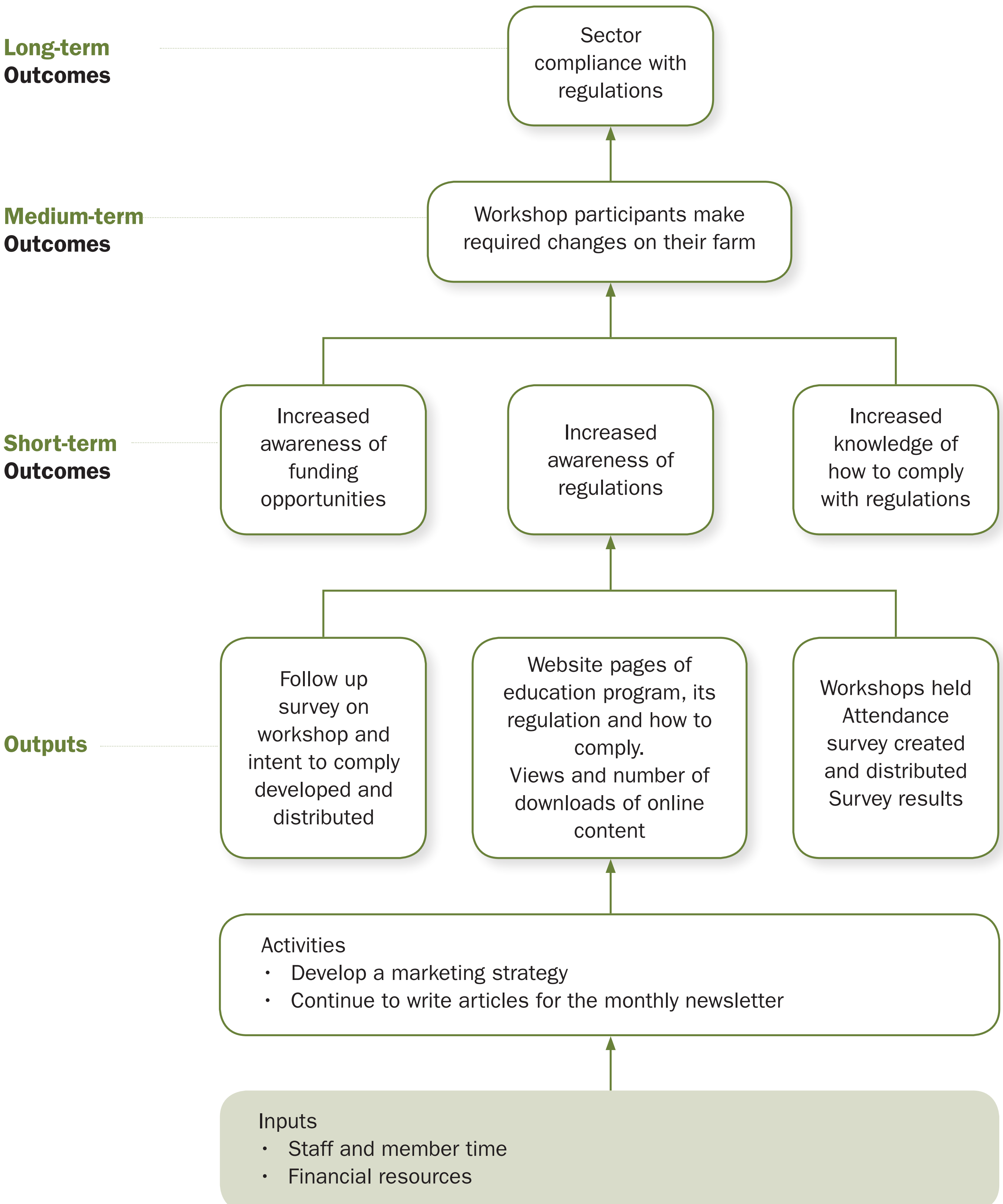
Activities	Outputs	Outcomes
Hold regional workshops and seminars	Resources and training developed that are tailored to the needs of the industry Variety of sessions offered throughout the year on best management practices, regulation changes, etc.	Exchange of knowledge and experience among participants Improved business management skills and practices of producers and processors Increased adoption of best practices
Host the annual conference	Annual conference organized which featured the following: • Information dissemination and training sessions and workshops for the industry • Presentations from experts from around the world • Farm tours and demonstrations • Benefit auction	Increased knowledge of new research, industry news and trends Growth in collaborative applied research and patents
Provide subscription to Agriculture magazine	Articles provided on a regular basis Advertisements for new members	Increased knowledge of new research, industry news and trends Increased membership

Industry promotion – We strive to be the primary source of information about the industry.

Activities	Outputs	Outcomes
Partner with processors to promote cereal grains Partner with our members who produce cereal grains	Booth at trade shows, food festivals and industry events Products, dishes and meals made from cereal grains and demonstrations on how to prepare them	Participants get excited over their new ways to use cereal grains
Create posters and recipe cards	Posters and recipe cards distributed	Ontario cereal grains are promoted to chefs, retailers and consumers
Manage commercial directory and engage with processors	Commercial directory distributed to industry professionals who were interested in purchasing products	Solidified current relationships in the industry and formed new ones Commercial growers who are members received exposure to potential buyers

Advocacy and policy development – We want to be the unified voice for all of the industry and build beneficial relationships with stakeholders.		
Activities	**Outputs**	**Outcomes**
Reach out to potential members	Number of new members	Increased awareness of issues facing the industry
Seek regular input from the membership	Attendance at provincial, national and international meetings with industry and governments and contributed to discussions	The interests of the cereal industry are represented
Participate in the farm bureau's Commodity Advisory Group	Vote on issues	Regional level efforts are coordinated to benefit Ontario agriculture
Represent members in national and international government bodies	Projects with government and other industries that address common issues	Changes in policy that reduce economic and regulatory barriers restricting the success of the IronOats growers
Research – We want to help the industry grow and prosper.		
Activities	**Outputs**	**Outcomes**
IronOats funds and participates in studies and research activities	Research papers Articles in magazines and newsletters Presentations at annual conference and tradeshows	A better understanding of issues facing producers and processors so the organization can better assist and administer useful resources to members Innovative ways to address economic, environmental and energy concerns with new techniques, technologies and best management practices Advancement of Ontario's cereal industry Recent research includes improved planting practices and harvest techniques and the development of value-added products from off-grade products.

IronOats Farmers of Ontario Education Program Logic Model



IronOats Education Program Shortlisted Performance Measures

Initiative: Assist members in complying with new regulations

Output/ Outcome	Long list of all potential measures	A	B	Total A + B	Rating	Notes
Readership of newsletter	Number of distribution channels	3	4	7	Potential	Easily obtained and nice data to have
Website page views and downloads Increased awareness of regulation	Number of page views and downloads. Percentage increase in page views and downloads	2	4	6	Potential/ Not Rrecom-mended	Online data are readily available and could be useful if accompanied by advertisements. If not then data are not particularly helpful or informative.
Attendance at in-class workshops	Number of attendees Percentage of members that attended	4	4	8	Recommended	Output measure of increased attendance at workshops
Increased awareness of funding opportunities	Number of inquiries about funding programs	2	2	4	Not Recommended	Would be interesting but not a focus of the training
Increased awareness of regulations	Attendance at sessions as a percentage of total member-ship	4	4	8	Recommended	If most of the membership attends then awareness is high
Increased knowledge of how to comply	Percentage of participants reporting increased understanding of how to comply with regulations	5	4	9	Recommended	Critical measure – data are obtained through a post-workshop survey

Output/ Outcome	Long list of all potential measures	A	B	Total A + B	Rating	Notes
Quality of the workshop	Percentage of satisfied participants in workshops and number of comments in the survey	4	4	8	Recommended	Since this is a new workshop, it will be beneficial to know if it's working or not
Workshop participants make required changes on their farms	Percentage of members reporting intent to apply what was learned (session survey question)	5	4	9	Recommended	This could act as a proxy for understanding the chances of participants achieving compliance
Workshop participants make required changes on their farms	Percentage of members reporting that they made required changes on the farm (Follow up survey)	3	4	7	Potential	This could act as a proxy for estimating the amount of compliance in the sector but will take more work to gather data
Sector compliance with regulations	Number of failures to comply with changes in regulation	4	1	5	Potential	A great measure but regulators may not be reporting results until well after training

IronOats Performance Measure Methodology for One Measure

Measure name Percentage of members reporting intent to apply what was learned following training
Outcome or output to be measured Workshop participants make required changes on their farms
Description/Rationale It is important to measure implementation of tools and training. Surveying the members at the workshops about their intent to comply is useful in understanding the effect of training on their actions. It is possibly a proxy for actual implementation. But this method is limited by whether or not participants follow through on their intentions. We might consider doing a post training survey at a later date to check in
Measure owner Project Development Coordinator
Data collector(s) Project Development Coordinator
Data source and frequency Data for this measure are collected using a paper survey at every workshop. They are summarized in an MS Excel spreadsheet and rolled into a quarterly report. It is impossible to eliminate all bias from the survey, but it is unlikely to be an issue in this instance. Members have incentive to leave constructive, honest feedback in order to improve the quality of the training provided to them
Data analysis and calculations Reported as a percentage of the number of survey respondents answering yes to survey question number eight — "Will you implement any of the best practices you learned today at your business?" divided by the total number of responses
Baseline Information There are no baseline data available as it would be very costly to determine how many farmers have already made changes. One measurement cycle may be necessary to establish at least a starting point for understanding the impact of training on the participants
Target or Trends to Look For Will look at the first workshop results and use that as a baseline. Minimum expectation is to maintain the result through all the remaining sessions
Reporting — Audience and Frequency Internal — Project team to review the results after each session and roll them up every six months in a report to the board of directors to be presented at a board meeting. External — The results are to be included in IronOats annual report to its members

Scenario 3: Local Food Group

About the local food group

A local food group was established in the county two years ago to promote the consumption of local food. The group's members included agriculture producers, farmers' market vendors and health unit staff.

Over the two years, the group has started a local food box program charging subscribers $25 for a box of locally grown fruits and vegetables. It has also established three community gardens across the county with the help of the staff members from the local health unit.

In addition, the group produced a "Buy Local! Buy Fresh!" guide to local food. The guide has the names of area producers who have signed up for the program and the fruits, vegetables and other products they sell and the time when available.

In the past, individual producers have had little success in getting area grocers to stock local foods. At the latest annual general meeting, members of the local food group decided that they should and could sell more local food in the area. They voted to increase the awareness and promotion of local food in the region, with the goal of increasing the sales and consumption of local food.

One of the first tasks they completed was to list what was available as starting points for a local food network in the area.

- Three farmers' markets
- Three community gardens
- Municipal newsletters
- Annual fall fair
- Four large retail grocery outlets

Prepare

Although the local food group met regularly and worked hard to establish the community food gardens and the local food box program, they had not put much effort into getting the big four grocery stores in the county to feature their products.

The group members had great success at the farmers' markets but the markets were seasonal and part of the county's tourist attractions.

The group did not really know if their advertising efforts were paying off. Since the members were considering devoting more of their time (and money) to the group, they felt it was time to get serious about what they were doing.

While the group members knew what needed to be done, they were less clear on how they were going to do it and what they expected to see happen.

The group members began working on a plan to increase the sale and consumption of locally grown food and to persuade area supermarkets and food stores to stock more local produce.

They began their discussions about what resources they had and what they might do with them. They talked about all the things they could do, who might be responsible and how they might work together. It became obvious that although they had created an environment of shared ownership and dedication to achieving their goal, they were struggling to determine what exactly they should do with the resources they had.

It also wasn't clear what exactly they were hoping to achieve. This would be a long-term investment of their time and money. Would they be able to achieve their goal? What would success look like? It would take time to see the impact of their efforts so they decided to map out what they were planning to do and what results they expected.

At the end of their first meeting they agreed to come together again to further detail their available resources, actions, anticipated outcomes and how they planned to measure progress.

Identify outcomes using a logic model

At another meeting, the members of the local food group mapped out what they wanted to accomplish. They all agreed that if they could increase awareness of local food in the region, people might be more inclined to buy it. They developed a logic model, which provided a visual summary of their plan. (page 61)

Create performance measures

As they were creating the logic model, they again discussed who would be leading and participating in each activity. There was a lot going on and everyone agreed that they needed to communicate regularly.

Once the logic model was completed, they sat down to list all the performance measures that might be useful for outputs and for outcomes. These would help them see whether or not they were making any progress towards their long-term outcome of increased consumption of local food and more local food available in the county's stores. They saw that some of their activities contributed to the same measure the higher up the model they went.

At a minimum they wanted one performance measure for each outcome and one good output measure for each activity to quickly identify how work was progressing. After an intense brainstorming session, they came up with a list of 16 performance measures:

- Percentage increase in local food shelf content in local stores
- Percentage increase in local food sales, and at farmers' markets
- Number of collaborations with local grocers

- Increase in the number of monthly food box subscriptions
- Number of attendees at farmers' markets
- Percentage capacity of community gardens
- Amount of local food on store shelves
- Percentage increase in local food brand recognition
- Number of mentions in articles and social media
- Number of cooking workshop attendees
- Number of inquiries at fall fair booth
- Number of workshop attendees
- Number of responses from the local grocers' survey
- Number of "Buy Local" brochures handed out
- Percentage increase in local food sales at farmers' markets

This was an impressive brainstorming session but there were too many performance measures. They needed to cull the list to the ones that told them what they needed to know with the least effort and expense.

They reduced the list by looking at the importance of the possible measures to decision making, and the amount of work involved in collecting the data for each of the measures.

For the table called *Local Food Group Shortlisting Measures*, please go to page 62.

The team ended up with a shorter list of six specific and easy-to-track measures with which they could communicate their work. They felt that if they were able to master reporting on these measures, they could add more if needed. The measures for the long-term outcomes would take a bit more effort but would be worth it.

The following is the list of performance measures the group chose:

- Percentage increase in local food on the shelves in local stores
- Number of collaborations with local grocers
- Percentage increase in local food sales at farmers' markets
- Increase in the number of monthly food box subscriptions
- Number of cooking workshop attendees
- Number of mentions in articles and social media

Collect, analyze and communicate results

Since there were many different activities going on at once being led by different people, the local food group members decided to designate a few members as a working group to further define their performance measurement framework. The working group was tasked with a detailed methodology for collecting, tracking and reporting each of their key measures. This table laid out who was responsible for tracking each performance measure, where the data would come from and how this measure would be tracked.

The table with the *Performance Measure Methodology for One Measure* is on page 64.

Note: The working group needed a separate methodology for each measure. Although they could have also chosen to compile all measures into one table and show only key pieces needed to communicate to the group as a whole.

Local Food Group Logic Model

Goal: Increase the sale and consumption of local food

ACTIVITIES

- Review/update "Buy Local" brochure
- Promote local food with a regular 'blurb' in municipal newsletters and social media
- Promote local food at fall fair
- Consult with area grocers on requirements to get local food in the stores
- Create a local brand
- Promote the area farmers' markets and community gardens
- Put on cooking demonstrations using local food
- Find and print recipes related to the contents in the local food box as the season changes

INPUTS

- Staff time (health unit) and volunteer time (producers, vendors)
- Financial resources for brochure and promotion

Local Food Group Shortlisting Performance Measures

Goal: Increase the sale and consumption of local food in the region

Output/ Outcome	Long list of all potential measures	A	B	Total A + B	Rating	Notes
More local food in stores	Percentage increase in the amount of local produce and food on the shelves in local stores	5	3	8	Recommended	Outcome measure of the overall growth of local food in local stores
Increased consumption of local food	Percentage increase in local food sales	5	3	8	Recommended	Outcome measure of increased consumption of local food
Increased demand for local food at farmers' markets	Percentage increase in local food sales at farmers' markets	5	2	7	Potential	Very important measure, however challenging to obtain data
Partnerships with local grocers	Number of collaborations with local grocers	4	5	9	Recommended	Outcome measure of the partnerships with local grocers
Increase in monthly food box subscription	Increase in the number of monthly food box subscriptions	4	4	8	Recommended	Outcome measure of the increase in monthly food box subscriptions
Number of customers to local farmers' markets increases	Number of people coming to farmers' markets	3	3	6	Not Recommended	Nice measure to have, but takes some effort to monitor
Increased usage of community gardens	Percent increase in number and size of community gardens	2	3	5	Not Recommended	Not very useful, takes resources to monitor

Output/ Outcome	Long list of all potential measures	A	B	Total A + B	Rating	Notes
Local grocer requirements identified	Amount of local food on store shelves	4	4	8	Recommended	If the group can address the needs of the local grocers then they might be more inclined to stock local produce
Increased awareness of local food/local producers	Percentage increase in local food brand recognition	3	2	5	Not Recommended	Nice measure to have, but challenging to measure
Newsletter articles and social media	Number of mentions in articles and social media	3	4	7	Potential	Output measure of newsletter articles and social media
Booth at fall fair with brochures and information	Number of inquiries at fall fair booth	2	2	4	Not Recommended	Not very useful. Community members would go regardless as it is a community event.
Health unit cooking workshop	Number of workshop attendees	4	5	9	Recommended	Output measure of the Health Unit cooking workshop
Survey for local grocers	Number of local grocers survey responses	4	5	9	Recommended	Output measure of the survey of local grocers
“Buy Local” brochure	Number of “Buy Local” brochures handed out	3	5	8	Potential	Easy to measure, but may not have large impact on decisions
Local food boxes with recipes	Percentage increase in local food sales at farmers’ markets	4	3	7	Potential	Outcome measure of increased demand for local food at farmers’ markets

Local Food Group Performance Measure Methodology

Measure name Percentage increase in local food sales
Outcome or output to be measured Increased consumption of local food
Description/Rationale Measuring the increase in local food sales tracks the increase in consumption in local food, since it is implied that consumers are buying food for the purpose of consumption
Measure owner Project Coordinator
Data collector(s) Project Coordinator
Data source and frequency Data will be collected from sales channels, such as local grocers and farmers' markets. Since local food distributers are required to compile this information the data are likely to be accurate. Potential issues may arise around the dependency on others for data
Data analysis and calculations This measure is a combination of the sales revenues in dollars from all sales venues. The previous year's total sales from the four retail stores and three farmers' is used as a baseline. Data will be collected twice a year and combined to get the average annual sales. Only the percentage increase in combined sales will be reported. Individual sales and reports will be kept confidential.
Baseline information Previous quarterly sales are available for the identified grocery stores in the region. However, data are not available for farmers' markets
Target or trends to look for To increase local food sales by one per cent per quarter at groceries and to see an increasing trend in quarterly sales at farmers' markets
Reporting – audience and frequency Quarterly report for project team and project sponsors

Appendices and Templates

Appendix 1: Glossary of Terms

Accountability: the obligation to answer for the results and the manner in which you discharge your responsibilities. Accountability cannot be delegated. Accountability is the obligation to take responsibility for an action.

Activity: work performed by organizations to put strategies, programs or projects into place. All activities use resources and produce products and/or services, which in the context of performance measurement are called outputs. One or more activities will be critical to the achievement of the goals and/or outcomes of a strategy or initiative.

Assumption: the act or instance of taking something as true without proof. This may include the beliefs that committee members have about a problem or situation and the resources required to intervene or to resolve it.

Attribution: the connection that can be made between specific actions or outputs and their outcomes. In performance measurement, there are degrees of attribution.

- **High or Direct** – the organization played a major role, and the connection between the outputs and the outcomes is relatively clear.
- **Medium or Indirect** – the organization played a supporting role in influencing the outcome.
- **Low or Influence** – the organization played a small or limited role in influencing the outcome.

Balanced scorecard/dashboard: a set of metrics that gives senior managers an at-a-glance perspective of the business, balanced across major functions.

Baseline: the starting point for assessing changes in performance and for establishing objectives or targets for future performance.

Benchmarking: the process of comparing organizational practices and performance over a period of time against a predetermined standard. For example, when you measure and compare the performance of your program with similar programs from similar-sized or oriented organizations that is benchmarking.

Cost effectiveness: the extent to which an organization, program, or service is achieving its goals or outcomes in relation to the resources or inputs used.

Customer/client: the person or organization to which services or products are delivered. A client may be a member of an organization or an employee of it, or a client may be external to the organization.

Customer satisfaction: the degree to which a product or service meets the needs and expectations of the intended recipients or beneficiaries for its quality and efficiency.

Effectiveness: the extent to which an organization, policy, program or project meets its intended objectives and is producing its planned outcomes.

Efficiency: the extent to which an organization, policy, program or project is producing its planned outputs in relation to the costs of the resources used.

Evaluation: the systematic collection and analysis of information on the performance of an initiative to make judgments about its relevance, progress and cost-effectiveness. This information is then used to make decisions about future programs.

Goal (higher level objective): the achievable and realistic expression of a desired result. A goal can be divided into a number of more specific objectives. For example, for a not-for-profit local food group a higher order goal may reflect its commitment to enduring human, civic, economic and environmental benefits. One objective of such an organization may be to provide a secure source of high quality, local produce that is affordable.

Inputs: the human, material or financial resources allocated to carry out activities, produce outputs and/or accomplish results. Some examples include staff, technology, equipment, supplies and money.

Logic model: an illustration of the connections and relationships between the resources or inputs, activities, outputs and outcomes. A logic model is a visual representation that shows what an organization, program or project proposes to do and what it aims to accomplish. It is a series of "**if … then**" relationships. For instance, if a process is implemented as intended then it will probably lead to the desired outcomes. A logic model is the core of program planning and evaluation.

Mandate or core purpose: an organization's fundamental reason for existence. It defines what an organization is tasked with doing and why that is important. For example, the mandate may be found in legislation or defined in a municipal government program.

Monitor: the process of collecting and analyzing data to track the outputs of programs, plans or projects and their progress towards their desired outcomes.

Objective: the achievable and realistic expression of a desired result. An objective is usually a lower level goal but can act as a substitute goal in specific strategic actions and operational plans. An objective is more specific when it comes under a goal in the same strategic hierarchy. For example, a not-for-profit local food group may have an objective of providing a secure source of high quality, local produce that is affordable.

Outcome: the actual effect of activities and outputs. The program, project or plan may include short-term, medium-term and long-term outcomes.

- **Short-term outcomes** – are the first level effects of the outputs or immediate response to the outputs. They may include changes in the awareness, knowledge, skills or attitudes of the target audience.

- **Medium-term outcomes** – are changes in behaviours, decisions, policies and actions that are attributable, at least in part, to outputs. These are outcomes you want to see.
- **Long-term outcomes** – are the ultimate or long-term consequences or changes in condition. These could be the economic, social or environmental results or the benefits to which a program or plan has contributed in some way. These are outcomes you hope to see.

Output: the products or services that result from the activities of a project or program. An output is the result when an activity reaches the intended audiences or clients. An output is used synonymously with a deliverable

Performance management: the day to-day business processes and actions that help an organization meet its strategic goals.

Performance measure: a quantitative or qualitative means of measuring an output or outcome. The intent is to be able to gauge the performance of an organization, program, project or initiative in achieving expected results. A performance measure is also called a performance metric or a performance indicator.

Performance measurement: is the ongoing process of collecting and analyzing data and then reporting the results. Performance measurement helps an organization assess the progress that it or one of its initiatives is making towards a desired outcome or goal.

Performance measurement framework: is a set of interconnected activities for the selection, development and implementation of performance measures. A performance measurement framework can also be used to generate information to manage programs, guide or inform decision-making, improve performance and communicate the achievement of results.

Priority: something that is given special attention or considered important by an organization, company or government. For example, a priority or higher-order goal of a producer may include using less water in its operations. Higher order goals of governments or not-for-profit organizations may reflect their commitment to citizens, members or stakeholders and contribute to enduring human, economic, civic and environmental benefits.

Qualitative data: the non-numeric information collected through interviews, focus groups, surveys, observation and the analysis of written documents. Qualitative data may include judgements, opinions and perceptions. Qualitative data can be quantified to establish patterns or trends.

Quantitative data: information that is counted or compared on a scale.

Reliability: the extent to which measurements are repeatable and consistent under the same conditions every time. For example, an organization may survey the participants of events it has organized using the same method each time.

Result: a product, output, condition or outcome that exists because of an activity.

Results-based management: a comprehensive approach that informs results-based decisions. Results-based management ensures that all the activities of an organization, institution or not-for-profit organization are aligned with the strategies that contribute to meeting its business priorities or to serving the interests of its clients or members.

Risk: the possibility of an event negatively affecting the chances of an organization achieving its goals and objectives.

Risk management: the active process of identifying, assessing, communicating and managing the risks facing an organization to ensure that it meets its objectives. Risk management includes re-visiting goals and objectives and possibly modifying or changing tactics when needed.

Stakeholder (for the purpose of performance measurement): any person, group, or organization that is affected by your organization's activities and has an interest in or expectation of the work of your organization. Stakeholders can also influence or place a claim on your resources or services.

Standards: the levels of performance that are agreed upon and commonly understood. These levels of performance or standards serve as the basis for judging or comparing actual performance.

Strategic plan: the recorded plan that describes and communicates the strategic direction of an organization based on its vision, mission and goals.

Strategy: a plan that outlines how specified activities and programs contribute to the goals and objectives of an organization.

Target: a clearly stated objective or planned result, which may include outputs and/or outcomes to be achieved within a stated time. The target will then be compared to the actual result. For instance, a local food group that is trying to sell more area produce may launch an online marketing campaign with the target of 1,000 information inquiries through the gateway website.

Validity: the extent to which an instrument for measuring accurately measures what it is supposed to measure. For example, a reading test may be a valid measure of an individual's reading skills but it is not a valid measure of a person's competency in the language.

Appendix 2: Logic Model Tip Sheet

Target Audience

Inputs → **Activities** → **Outputs** → **Outcomes**
Changes we seek to influence

Short-term → **Medium-term** → **Long-term**

Inputs	Activities	Outputs	Participation of the target audience(s)	Short-term outcomes	Medium-term outcomes	Long-term outcomes
Resources • Financial resources • Staff (Number of FTE/PTE) • Scientific and technical competency of staff • Advisory and facilitation skills of staff members • Leadership • Administrative support • Time and budget • Equipment, technology • Supporters, partners or stakeholders	**What you do** • Provide advice • Offer/deliver training • Provide funding for projects • Publish and/or provide resources • Market and communicate • Advocate for others • Promote programs • Engage with stakeholders • Manage agreements • Collaborate or partner with industry, community groups • Partner governments	**What you produce or provide** • Materials distributed • Services provided • Workshops or events held • Awareness campaigns completed • Funding provided • Knowledge transferred • New technology shared	**The potential members of your target audience(s)** • Recipients of your services or outputs • Participants in a program or its beneficiaries, both direct and indirect – Clients – Members of your association – Internal or external stakeholders – Other associations – Industry groups – Government agencies – Decision makers – Public	**What occurs as a result of the activities and outputs** These are the expect-to-see changes in learning of the target audience(s) and could include changes the following areas: • Awareness • Knowledge/skills • Readiness/motivation • Attitude/values • Perception/opinions • Aspirations/intentions	**Results that follow the initial outcomes** These are the want-to-see actions of the target audience(s) or beneficiaries. They could take action or improve their practices in the following ways: • Adopt new practices or behaviours over time • Improve processes and/or adopt new and improved products • Refine and change how decisions are made • Adopt new policies and procedures or change them • Become advocates	**Longer term consequences or results that should follow medium-term outcomes** These are the hope-to-see effects or benefits for the target audience(s) or sector or public values. They are captured or seen as fundamental changes in some of the following areas: • Economic – e.g. growth or sustainability • Prosperity – e.g. improved income/capita • Social/human – e.g. improved health • Environmental – e.g. greener agricultural practices and processes
Questions to Ask • What resources are used to support the program? • How are resources being used? • How much work is expected? • How much time/money are you spending on which activities?	**Questions to Ask** • What are the main activities and benefits of the program or project? • How well are you using your resources in relation to outputs or outcomes achieved?	**Questions to Ask** • How many and what kinds of products or services are being delivered? • Did all activities proceed as intended?	**Questions to Ask** • How many members of the targeted audience are you reaching? • Who and how many members of your target audience are receiving your services or attending your events? • What are their reactions? • What is the quality of the program or service from their perspective? (e.g. satisfaction, timeliness) • Who did not participate?	**Questions to Ask** • What did the members of your target audience learn? • Do they have a better understanding of subject matter? • To what extent has their understanding improved? • How do they demonstrate their improved knowledge? • What do they intend to do?	**Questions to Ask** • What changes have they made? • How do you know they are taking action? • How much change is taking place? • What else happened?	**Questions to Ask** • What is the anticipated impact? • Who or what is better off? • What benefits did the members of your target audience(s) experience? • To what extent did these changes occur? • Were there any unintended or negative consequeces?

In a typical logic model, outputs are the result of what the organization delivers, and outcomes describe what happens with the target audience. Performance measures are created to answer questions such as the ones listed under the heading Questions to Ask in the third row.

Appendix 3: Diagnostic Questions

Use the self-diagnostic questions to understand the key tasks of establishing a performance measurement framework. These questions can help you quickly identify and explain to others where you are at and what you are doing in your performance measurement process. You and your team are the best judges of how effective your framework is working.

Tip: If you answer no to any of the questions, you should review the materials. If you answer yes to all of the questions in a stage, then you are ready to move on to the next stage.

Stage I: Prepare - performance measurement	**Yes?**
If you are creating measures for your strategic plan, have you thoroughly clarified your expectations for performance measurement?	
If you are creating measures for a specific initiative, do you understand the requirements of the performance measurement process?	
Do you have the right resources and team to implement performance measurement?	
Have you identified the key stakeholders for performance measurement?	
Have you discussed their expectations with them?	
Have you addressed, at least initially, any potential resistance to performance measurement?	
Stage II: Identify outcomes using a logic model	**Yes?**
Are you able to differentiate between inputs, activities, outputs and outcomes?	
Have clear outcomes been established and agreed upon?	
Have the key activities and resources been defined?	
Has a logic model been created to link inputs, activities, outputs and outcomes?	
Have you explained your logic model to your stakeholders?	
Stage III: Create performance measures	**Yes?**
Have you selected your performance measures?	
Have your performance measures been prioritized so that you have a manageable number of measures?	
Have you communicated your choices to stakeholders?	
Stage IV: Collect, analyze and communicate the results	**Yes?**
Do you have an organized method of collecting information?	
Have you documented the requirements for data collection, analysis and reporting for each of your measures?	
Have you established baselines or targets for your measures?	
Have you defined how and when reporting will take place and decided who will receive the results?	
Do you have a method of communicating results to stakeholders?	

Appendix 4: Sample Outcomes and Performance Measures

The following tables list a variety activities, outputs, outcomes and performance measures that agriculture and agri-food organizations might use. In these tables, it is acknowledged that some agriculture and agri-food associations will have individual members only and some associations will be umbrella organizations, whose members are agriculture and agri-food associations. It is not an exhaustive list. Use it for guidance only as the performance measures needed for your organization should be tailored for your unique needs.

Member education and capacity building

Provide members access to information in order to build capacity for various activities, such as marketing, environmental stewardship, regulatory requirements and business risk management.

Activities	Outputs	Outcomes	Outcome Measures
• Provide education and training workshops • Sponsor conference speakers • Sponsor education, training, field trips and education days • Set up booths at domestic and international conferences • Produce content for website and other social media • Develop agriculture and agri-food business tools • Sponsor members to attend educational events • Provided agriculture and agri-food accredited courses	• Members participating in various activities/events • Speakers sponsored (international, domestic) • Members using networks to advance their careers • Members applying for and taking training • Members accredited in a particular area • Hits to website/social media sites • Downloads of educational material and information • Requests for information and educational materials for information and educational material	• Increased awareness by members of new technologies, discoveries, practices, etc. • Increased number of members who intend to adopt new practices and technologies • Increased understanding of the merits of capacity building • Consumer attitudes change • Increase in the adoption of new practices and technologies • Increased production efficiencies • Increased adherence to regulations • Reduced operating costs and larger gross margins • Increased capability to comply with regulations and to manage risk • Increased access to more markets	• Percentage of target audience who completed a workshop • Percentage or number of participants who are satisfied with the quality of the activities provided • Number of members reporting increased awareness of regulations, policies etc. • Number of members reporting their intention to adopt best management practices • Number of members reporting that they have adopted or implemented best management practices over two to five years • Number of members reporting gains in efficiency • Reduction in cost of production per agri-food product • Reduction of risk-borne setbacks to profitability • Increase in the number of markets and/or the number of new markets accessed • Members report an increase in the percentage of total sales and in the total dollar amount for sales • Percentage or number of participants who would recommend workshop to others

Knowledge transfer and translation

Share new and existing information, knowledge and technology through networking events, initiatives and technologies.

Activities	Outputs	Outcomes	Outcome Measures
• Set up booth and provide brochures at workshops and networking events • Attend workshops and conferences • Allocate funds to support promotional workshops • Publish newsletter articles and have a social media presence • Meet with key members of the sector and government • Provide online web page resources	• Workshops and networking events • Presentations delivered • Funding for promotional workshops • Social media pages • Newsletter articles • Brochures handed out • Meetings with industry and government • Website content	• New technology and knowledge is adopted • Increased awareness and knowledge of how to access new information • New routes for knowledge transfer developed • Reduced operating costs • Increase in applications for funding program • Routes of knowledge transfer • Increase in use of knowledge transfer routes because they are easier to navigate and more efficient • Increase in the adoption of tools and training • Increase in shared technology throughout sector • Increased the amount of product available to meet demand • Increase in the profitability of the sector because of current technology	• Number of new technologies adopted • Percentage decrease in operating costs • Percentage increase in number of groups represented by the organization applying for funding • Percentage decrease in annual cost of knowledge transfer • Percentage decrease in the hours of training provided in researching and locating resource materials • Percentage in the annual increase in the adoption of new tools and of training • Number of markets expanded and or new markets accessed • Percentage increase in sales and exports • Percentage increase in jobs in sector

Research

Support and conduct research to assist growth and sustainability of sector. Investments in research.

Activities	Outputs	Outcomes	Outcome Measures
• Fund research projects. • Hold research workshops and other events to establish research networks • Partner with research institutions to engage in research • Form partnerships (in-kind, cash) to conduct research • Provide research grants	• Investment in external research • Research projects funded by organization • Research grants approved • Meeting research project milestones • Funds set aside for research that has been allocated to research projects • Collaborative research partnerships • Undergraduate and graduate students funded and trained • Participation in research by members and organization	• New knowledge, information and technologies supported by organization • New research opportunities are easier to identify • Research opportunities are expanded due to grant funding • The development of new knowledge, information and technologies that advance the sector • Increased innovation within the sector • New technologies implemented by members • Increases in productivity • Enhanced research capacity in the sector • Research is conducted at a more efficient pace • Enhanced relevance of research, such as research targeted to specific areas in production	• Number or percentage of members indicating satisfaction with the priorities and direction of the research • Number of articles in peer reviewed publications as a result of research projects • Number of articles in other publications • Number of members reporting knowledge of research findings • Number of conference presentations and proceedings • Number of completed theses/degrees related to research projects • Milestones met and projects completed • Percentage decrease in time required to identify new research opportunities • Number of new research projects undertaken • Number or percentage of members adopting and incorporating information and techniques into practices • Number of new or improved processes or products • Number or percentage of participants reporting benefits because they adopted new practices • Patents applied for as a result of research • Percentage decrease in time required to complete research projects

Promotion and public education

Promote agri-food products to the public and inform public about the sector's and the members' activities, outputs, etc. (similar to advocacy).

Activities	Outputs	Outcomes	Outcome Measures
• Set up booths at workshops and networking events with brochures • Present at workshops and conferences • Publish newsletter articles and be active in social media • Produce brochures for the organization • Meet with representatives from agri-food processors, government and government agencies • Introduce agri-food education into public school curriculum	• Workshops and networking events attended • Presentations delivered • Secured funding for promotional workshops • Reach of social media pages • References from members of the public on social media • Newsletter articles • Brochures handed out • Meetings with industry members • Schools incorporating agri-food education into curriculum	• Increased awareness of the products of the organization and the sector • Increase in sales of products • Fair product prices to cover cost of production • Better understanding of sector's activities • Increased global awareness of represented groups and the sector as a whole • Growth of the sector including an increase in profitability • Benchmarks set for fair pricing in the long-term • Understanding of the agri-food sector among future generations	• Percentage or number of members reporting an increased awareness of the needs of the organization and industry • Number or percentage increase in customers at farmers' markets, agri-tourism regions, agri-food sites, etc. • Percentage increase in total sales • Increase in sales and exports • Percentage increase in jobs in sector • Percentage increase in export sales • Percentage increase in sector recognition • Increase in average prices annually

Advocacy (or representation)

Advocate to governments for increased consideration in policy decisions and for policy changes on behalf of members, the sector and/or the industry. This could include collaborating with a variety of organizations on research, analysis and projects that might influence the development of policies in the future.

Activities	Outputs	Outcomes	Outcome Measures
• Monitor regulations and their potential effect on the sector • Produce brochures and other materials • Hold/sponsor networking events with government officials • Produce and distribute materials • Sponsor members and staff to participate in networking opportunities • Invite government officials to speak at events and to network with organization • Hold field days with government officials, such as breakfast on farm • Commission studies and/or have experts complete reviews of proposed policies and regulations • Consult with stakeholders • Distribute results to organizations, government, academia and businesses	• Brochures and materials produced and distributed • Distribution channels for brochures • Press releases, articles, reports, blogs, and tweets produced and published • Hits to and downloads from the website • Conferences attended by organization at which government officials were present. • Meetings with senior government officials/politicians • Networking events or workshops attended by organization and government representatives • Workshops and events hosted by organization to which government officials were invited to participate • Staff consultations	• Fully informed policy makers on issues or effects of government policy • Fully informed industry on issues or effects of government policy • Increased interaction and networking between government and organization's members • Increased awareness by government of organization's needs • Increased willingness to take action • Unified voice that accurately represents the needs of the sector • Improved media coverage, such as more accurate information and an increase in positive publicity • Positive feedback obtained from key stakeholders • Changes in policies, programs and regulations for which the organization is advocating. • Increased resources allocated to sector priorities such as staff and funding • Established communications network between government and organization • Increased consideration of organization or industry needs in future policy decisions	• Number and type of invitations by government to organization to participate in policy planning initiatives — stakeholder engagement • Number of networking events with government officials by organization • Number of government officials in attendance at networking events • Number of government guest speakers at organization's events • Number of workshop participants • Number and percentage of recommendations adopted by government • Number of positive mentions in media • Achievement and implementation of desired legislative or policy changes • Agreements or partnerships established for future work, such as a memorandum of understanding • Decrease in the amount of funding required for advocating on behalf of the organization about proposed policies

Marketing

Advocate and negotiate on behalf of organization and/or commodity groups for fair prices, contracts, processes, etc. with marketing boards and other organizations. Plan the production, grading, packing, transport, storage, distribution, advertising and sale of agricultural products.

Activities	Outputs	Outcomes	Outcome Measures
• Meet with agri-food processors, government and government agencies such as the Ontario Farm Products Marketing Commission • Produce marketing tools suited for organization and commodity groups • Negotiate on behalf of members using experienced negotiators • Establish new contracts with different processors, government etc.	• Participants in meetings with external parties • Outreach of marketing campaigns • Optimize organizational time required for advocating and negotiating • New contracts with processors, government	• Increased awareness of the products of the organization's members and of the sector • Increase in sales of products • Fair product prices to cover cost of production • Contractual agreements better suited to the needs of groups represented by organization • Increased global awareness of groups represented by the organization and the sector • Standards are implemented for smoother negotiations • Growth of the sector and increased profitability	• Percentage increase in sales • Percentage increase in market price negotiated with marketing boards for agricultural commodities • Percentage increase in export sales • Percentage increase in product profit margins • Percentage increase in consumption • Percentage decrease in internal planning and marketing costs • Percentage increase in outreach of marketing initiatives • Percentage increase in sales and exports • Percentage increase in jobs in sector • Percentage decrease in resources required for negotiations • Percentage increase in sector recognition

Direct member services

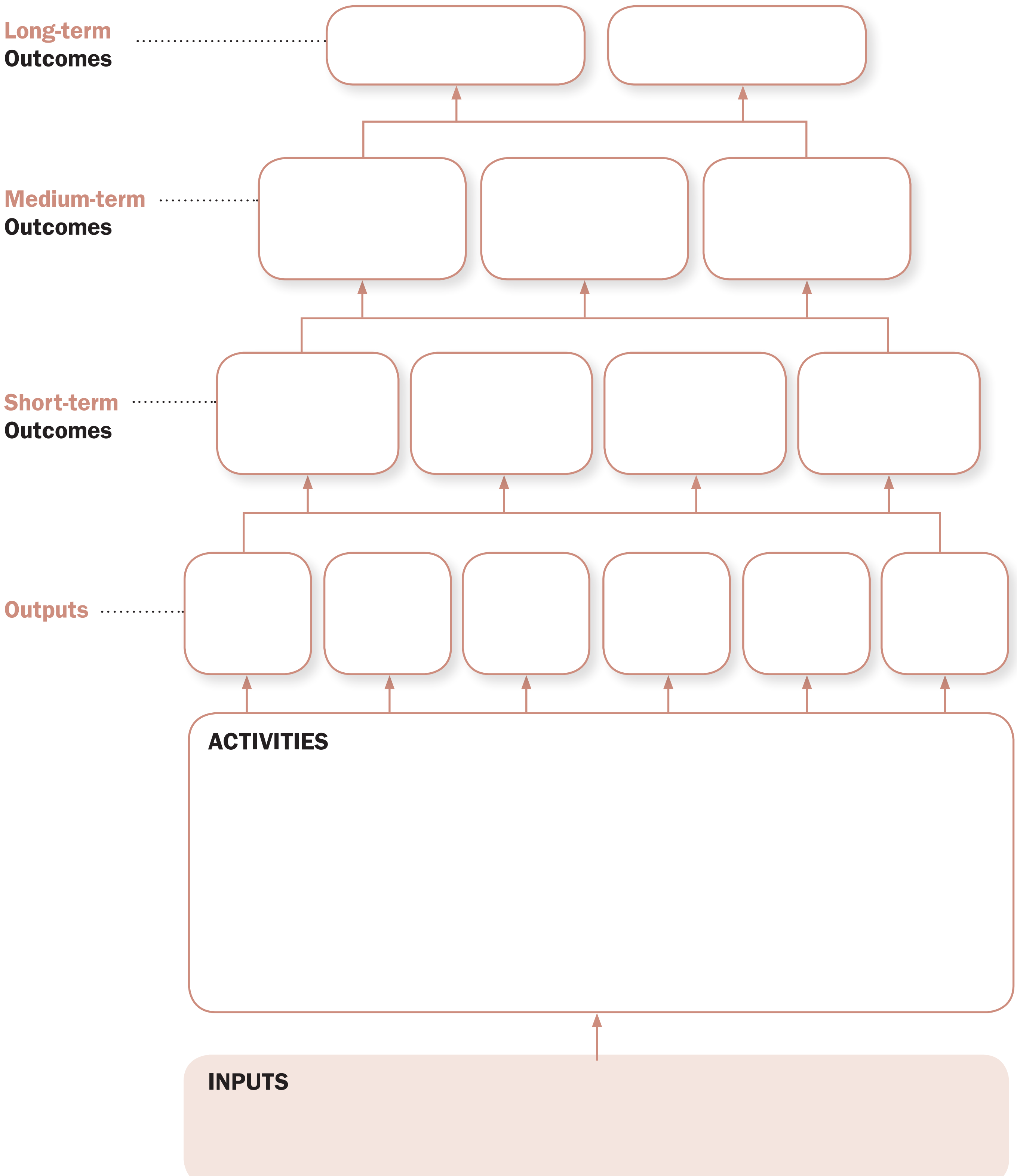
Provide services to members such as insurance, helping with the cost of production, with discounts on capital needed for production, etc.

Activities	Outputs	Outcomes	Outcome Measures
Provide one or more of the following: • Insurance on assets • Discounts on capital needed for production such as machinery or seeds • Other direct services such as graphic design, construction, shipping etc.	• Services received by clients • Quantity of discounts received	• Time savings • Ability to meet policy and legal requirements • Cost savings • Increased profitability of members • Increase in the ability of members to comply with regulations • Loyalty established with service providers	• Time saved as a result of external service provider • Number of legal or policy requirements met • Value of cost savings as a result of services provided • Percentage decrease in costs associated with services administered • Decrease in time and cost required to comply with regulations • Percentage decrease in time required to find new service providers

Appendix 5: Templates

Appendix 5.1 Logic Model Template

Organization/Initiative ______________________________



Appendix 5.2 Shortlisting Performance Measures Worksheet

Initiative: ______________________________

Output/ Outcome	Long list of all potential measures	A	B	Total A + B	Rating	Notes

Scoring criteria

A. Importance for Accountability and Decision Making
- 5 – critical measure
- 4 – important measure
- 3 – nice to have
- 2 – not very useful
- 1 – not at all useful

B. Work involved in monitoring and reporting
- 5 – already doing it
- 4 – simple to do
- 3 – some work, but feasible
- 2 – a lot of work
- 1 – almost impossible

Potential rating
- **8 and higher – recommended**
- **5 to 7 – potential**
- **4 or less – not recommended**

Appendix 5.3 Performance Measure Methodology Template

See the back page for details about what to include in each row.

Measure name	
Outcome or output to be measured	
Description/ Rationale	
Measure owner	
Data collector(s)	
Data source and frequency	
Data analysis and calculations	
Baseline information	
Target or trends to look for	
Reporting – audience and frequency	
Notes	

For each measure you should consider including the following information in your methodology.

Measure name	• A name or title for your measure
Outcome or output to be measured	• Which outcomes or outputs is the measure related to?
Description/ Rationale	• Why are you using this measure? • How does it demonstrate that your initiative is making progress towards the outcome? • List any limitations or attribution levels that might help people better understand the measure.
Measure owner	• Name the individual or individuals who are accountable for ensuring the accurate and timely collection of data as well as for reporting the results. They could also be the data collector.
Data collector(s)	• List individual or individuals responsible for ensuring the data is collected, analyzed and reported as required. • Also list those responsible for obtaining the data.
Data source and frequency	• Where will the data come from? • How and when will it be collected? • Consider how frequently the data are available and how reliable the data will be.
Data analysis and calcula-tions	• How will results be calculated? • When are results calculated? (e.g. quarterly, once a year)
Baseline information	• A baseline is the starting point for assessing changes in performance and for establishing objectives or targets for future performance. • What do you know about current performance?
Target or trends to look for	• How will you know if your program or project is successful? • What is the target that your measure has to reach? • What will indicate success over time?
Reporting – audience and frequency	• Will you report the results externally and internally or only internally? • How will you report the results and how often? Will you give a monthly report to the board and write a report for the quarterly or annual news letter to members
Notes	• Any additional information that will help to increase your readers' understanding of the measure.

Appendix 6: Additional Resources

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