

What is a Nonprofit Performance Management System?

And why does my organization need one?

Outcome	Performance Management Benchmark - General	Level 1: Very few benchmark practices in place (does not meet benchmark)	Level 2: Some benchmark practices in place (does not meet benchmark)	Level 3: Basic Level of Capacity in Place (does not meet benchmark)	Level 4: Complete Capacity in Place (required to meet benchmark)	Capacity Rating as of fall 2015	Capacity Rating as of fall 2017
Agency mission and programs are built on effective practice framework:							
1	Agency's program strategy is based on effective or promising practices in its field.	Agency staff demonstrate limited understanding and value of effective practice framework and intended participant outcomes	Agency staff understand and value the effective practice framework, including the basic foundational practices (specify them)	Agency practices at least half of the foundational practices of the effective practice framework (specify them)	Agency practices ALL the foundational practices of the effective practice framework (specify them)		
2	Agency theory of change is built on a clear mission statement, identifies a specific target population, and sequence of outcomes it will help them achieve, through a codified program strategy on the ground.	Agency mission statement and program practice does not identify specific target population OR outcomes it will help them achieve	Agency mission statement identifies specific target population, outcomes it will help them achieve, AND has created clear program blueprint that codifies program strategy on the ground in realistic dosage and duration needed to achieve outcomes	Agency mission statement identifies specific target population, outcomes it will help them achieve, AND has taken some steps to implement codified program strategy on the ground (clear dosage and duration) with target population	Agency mission statement identifies specific target population, outcomes it will help them achieve, AND implements codified program strategy on the ground (clear dosage and duration) with target population that produces some evidence of positive intermediate participant outcomes. (see definition of range of evidence-based research in Introduction)		
3	Agency completes a logic model (LM) which clearly and concisely demonstrates its unique theory of change.	No program logic model (LM), OR no participant outcomes articulated	LM includes an accurate description of inputs, activities, outputs, and outcomes	LM includes description of inputs, activities, outputs, and outcomes that is clear and comprehensive; AND a reasonable connection exists between activities and outcomes	Logical, tight flow of influence from activities through entire sequence of outcomes, leading to meaningful long-term outcomes; LM elements are stated clearly, comprehensively, and concisely, including performance implementation standards.		

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Agency measures and learns from outcomes:							
4	Agency identifies specific indicators to measure participant outcomes, for the most important intermediate outcome and related initial outcomes.	Agency has not selected which outcomes to measure, or it is not convinced of the importance of the outcomes data it plans to collect	Agency has selected the most important outcomes to measure but does not have specific indicators identified	Agency has specific indicators for at least one important outcome which are observable and measurable; some uncertainty remains on which indicators to measure	Agency has identified and agreed on indicators for the most important initial and intermediate outcomes, which are specific, observable, and measurable		
5	Agency identifies data sources and data collection procedures for each indicator.	No data source selected, or uncertainty about data source selected	Data source selected, but is likely to produce inaccurate or inconsistent data, OR plan to collect data is incomplete or unrealistic	Data source(s) likely to produce accurate and consistent data; but written workplan to collect data is incomplete or unrealistic	Data source(s) likely to produce accurate and consistent data, considering both qualitative and quantitative data; written workplan to collect data is realistic and complete; <i>AND</i> staff are qualified and available to implement workplan		
6	Agency has technology systems in place to track indicator data for each outcome.	Agency has no technology system to track indicator data in outcomes measurement plan	Agency has a technology system to track indicator data in OMP, but it does not use it regularly or as intended	Agency has a technology system to track indicator data in OMP, data is regularly inputted, but reports are not regularly generated that are useful for analysis	Agency has a technology system to track indicator data in OMP, data is regularly inputted, and reports are regularly generated that are useful for analysis		
7	Agency collects participant outcomes data using systems and procedures described in 4 and 5 above.	Agency has not tried outcome measurement plan (OMP)	Agency has tried outcome measurement plan, but did not collect complete set of data for all relevant participants	Agency has tried outcome measurement plan and collected complete set of data for all relevant participants, but was dissatisfied with process and has not determined how to improve OMP	Agency implemented complete outcome measurement plan; and has identified ways to improve OMP or is satisfied with it.		

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8	Agency analyzes participant outcomes data; asks questions: What does it say? What does it mean? What do we learn?	Agency has not compiled or analyzed outcomes data	Agency has compiled outcomes data but has not met in a group to review, analyze and learn from it	Agency has compiled outcomes data and met at least once to review, analyze, and learn from it	Agency has regularly scheduled sessions including direct service staff, management, and Board, in which compiled outcomes data is reviewed to determine the meaning of results and lessons learned		
9	Agency has human resource performance appraisal system, documenting and connecting individual performance with organizational performance, and giving feedback.	Any of these is true: <ul style="list-style-type: none"> Fewer than 50% staff and volunteers have current written job descriptions Fewer than 50% receive regular supervision (once weekly for FT); Performance reviews and professional development activities are rare. Any increases are tied to cost of living allowances only. 	75% staff and volunteers have: <ul style="list-style-type: none"> Current written job descriptions AND <ul style="list-style-type: none"> Regular supervision and support (once weekly for full time) 	100% staff and volunteers have: <ul style="list-style-type: none"> Current written job descriptions AND <ul style="list-style-type: none"> Regular supervision and support (once weekly for full time) AND at least 50% staff receive relevant professional development and regular performance evaluations	100% staff and volunteers have all the following: <ul style="list-style-type: none"> Current job descriptions with clear competencies needed to help participants achieve outcomes Regular supervision and support (once weekly for full time) Relevant professional development AND <ul style="list-style-type: none"> Regular performance evaluations holding them accountable for helping participants achieve outcomes 		
10	Agency uses outcomes data to improve service delivery, reward staff performance, and inform management decisions.	Agency does not measure outcomes (score 1-3 on #7) OR does not meet regularly to learn from outcomes data (score 1-3 on #8)	Agency measures outcomes regularly AND meets regularly to learn from them (scores 4 on both #7 and #8) AND has taken steps to change program or to drive a management decision	Agency uses outcomes data regularly to improve service delivery, to inform management decisions, OR to reward exemplary staff performance (at least one regularly)	Agency culture shows eagerness in regularly using outcomes data to improve service delivery, inform management decisions, AND reward exemplary staff performance		
11	Agency demonstrates improvement in participant outcomes over time.	Agency does not measure outcomes (score 1-3 on #7) OR does not meet regularly to learn from outcomes data (score 1-3 on #8)	Agency measures outcomes regularly AND meets regularly to learn from them (scores 4 on both #7 and #8) AND has taken steps to change program or to drive a management decision	Agency measures outcomes regularly AND meets regularly to learn from them (scores 4 on both #7 and #8), AND youth outcomes level increases from one year to next	Youth outcomes measured increases from one year to next (either number of participants achieving outcomes or average outcomes achievement level), and increase is likely attributable to improved service performance		

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Agency communicates clearly with funding partners:							
12	Agency develops written plans for each service delivery area: goals, objectives, target clients, projected outcomes.	Any is true: <ul style="list-style-type: none"> Program descriptions do not consistently align with actual staff activities; OR <ul style="list-style-type: none"> Written plans omit goals, objectives, target clients, OR projected outcomes; OR <ul style="list-style-type: none"> Goals, objectives, target clients, or projected outcomes are unclear 	All must be true: <ul style="list-style-type: none"> Written plans accurately reflect staff activities Goals are moderately clear, conceptual, and compelling 	All must be true: <ul style="list-style-type: none"> Written plans reflect activities Goals are clear, conceptual, and compelling Objectives are measurable Projected outcomes are realistic and meaningful for target clients; AND <ul style="list-style-type: none"> Written plans reflect solid theory of change scoring 1 or 2 in outcome 2 above 	All must be true: <ul style="list-style-type: none"> Written plans reflect activities Goals are clear, conceptual, and compelling Objectives are measurable Projected outcomes are realistic and meaningful for target clients; AND <ul style="list-style-type: none"> Written plans reflect solid theory of change scoring 3 or 4 in outcome 2 above 		
13	Agency regularly informs stakeholders and funders of its participant outcomes.	Any is true: <ul style="list-style-type: none"> Does not regularly send funding reports on time; Does not report on participant outcomes; Does not publish newsletter or updates 	Both are true: <ul style="list-style-type: none"> Funding reports are good quality and are usually on time, AND <ul style="list-style-type: none"> Funding reports sometimes include outcomes data 	High quality, on-time written funding reports consistently include progress on participant outcomes	High quality, on-time written funding reports include progress on participant outcomes; AND between reporting deadlines and required meetings, agency initiates personal contact with stakeholders and funders to review progress on participant outcomes		
Agency coordinates services with partners:							
14	Agency develops clear recruitment and enrollment process for its target population.	All participants are welcome. There is no eligibility criteria or enrollment process for our participants.	Agency has established eligibility criteria for participants, but referral and enrollment process is incomplete.	Agency has established clear eligibility criteria for its target population, with one or more of the following in addition, but not all: sufficient referral sources, clear enrollment and assessment process, clear process for realistic participant engagement.	Agency has established clear eligibility criteria for its target population, AND sufficient referral sources, AND a clear enrollment and assessment process, AND a clear process for realistic participant engagement.		
15	Agency refers participants it does not serve to appropriate partners for relevant services (no wrong door).	All participants are welcome; OR ineligible participants are turned away without appropriate referral information.	Ineligible participants are occasionally given referral information to partner agencies.	Ineligible participants are always given appropriate, current referral information to trusted partner agencies.	Ineligible participants are always given appropriate, current referral information in writing to trusted partner agencies. In addition, staff make a follow up call or in person visit to see if referral "stuck."		

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16	Agency refers enrolled participants to appropriate partners to receive the support needed to achieve intermediate outcomes.	Agency does not refer participants to other services or opportunities. Does its best to provide all services themselves.	Occasionally staff refer participants out for other services or opportunities, depending on the staff person and their individual relationships and contacts.	Agency has developed a written agreement with a partner agency that is accountable for helping participants achieve success on a related outcome (shared goal). May not yet be mutually sustainable or have outcomes data.	Agency has developed agreement with partner agency that: 1. Is accountable for helping participants achieve success on a related outcome that is necessary to achieve intermediate outcomes, 2. The terms of agreement and referral process are documented in writing, 3. Has a track record of success, including outcomes measured with target population (relevant quality services), <i>AND</i> 4. Is mutually sustainable for both agencies in terms of relationship and benefits.		
17	Agency develops strategic partnership with agency accountable for long-term meaningful participant outcomes (baton hand-off)	Agency is unclear on long-term participant outcomes or does not have partners identified who are responsible to help participants achieve long-term success.	Agency has articulated its expected long-term participant outcome <i>AND</i> has identified at least one potential partner who is responsible to help participants achieve long-term success (but no written agreement has been articulated)	Agency has developed a written agreement with a partner agency that is accountable for helping participants achieve success on long-term outcomes (shared goal). May not yet be mutually sustainable or have outcomes data.	Agency has developed agreement with partner agency that: 1. Is accountable for helping participants achieve long-term success as a shared goal, 2. The terms of agreement and referral process are documented in writing, 3. Has a track record of success, including outcomes measured with target population (relevant quality services), <i>AND</i> 4. Is mutually sustainable for both agencies in terms of relationship and benefits.		