

# **Performance Management**

## **October 2014 New York AmeriCorps Training**



**October 22, 2014**

October 2014 New Your AmeriCorps Program Director Training

<b>Problem</b>	<b>Inputs (members, partnerships, resources, etc.)</b>	<b>Activities and Strategies</b>	<b>Outputs</b>	<b>Short Term Outcomes</b>	<b>Intermediate Outcomes</b>	<b>Long term Outcomes</b>

**People or Community Problem**

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*What is happening?*

*What are the problems? What challenges do those who are affected or communities who are affected face?*

*What resources or opportunities do your communities and the people you serve lack or not have access to?*

*Who specifically is affected?*

**Keeping the End in Mind**

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*Imagine that it is 2018 and you are at the end of your 3 year AmeriCorps grant. Your organization and program has been wildly successful – **great change** has happened with the **people** you serve, the **communities** you serve in, with the **partnerships** you have formed, and with the **members** that were a part.*

*What is happening? **What does** that **success look like**? What is the **long term goal or change** you are hoping to see happen as a result of our work? **What will happen along the way** that lets you know you are on your way to success?*

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<b>DATA COLLECTION METHODS</b>			
<b>Method</b>	<b>What It Is</b>	<b>Benefits</b>	<b>Things To Consider</b>
<b>Observation</b>	Visual and auditory observation of the activities of project staff and participants	<p>Observation is especially useful when conducting context and implementation evaluation because it may indicate strengths and weaknesses in the operations of your project, and may enable you to offer suggestions for improvement.</p> <p>Information gathered through observation will allow you to:</p> <ul style="list-style-type: none"> <li>• formulate questions which can be posed in subsequent interviews;</li> <li>• examine the project’s physical and social setting, staff and clientele characteristics, group dynamics, and formal and informal activities;</li> <li>• become aware of aspects of the project that may not be consciously recognized by participants or staff;</li> <li>• learn about topics that program staff or participants are unwilling to discuss; and</li> <li>• observe how project activities change and evolve over time.</li> </ul>	<p>Despite its value as a strategy for data collection, observation has limited usefulness in certain situations. For example, observing certain events would be inappropriate if the observation violates confidentiality. Other types of observation, although legal, could violate cultural values or social norms. For example, a male evaluator of a project serving pregnant women should not intrude visibly on program activities if his presence would be disruptive.</p> <p>An evaluator should also recognize that even the most passive, unobtrusive observer is likely to affect the events under observation. Just because you observe it, do not assume that you are witnessing an event in its “natural” state.</p>
<b>Interviews</b>	to learn how staff and clientele view their experiences in the program, or to investigate issues	<p>Provides a means of cross-checking and complementing the information collected through observations.</p> <p>The inside knowledge gained from interviews can provide an in-depth</p>	<p>If you wish to record an interview, first obtain permission from the interviewee. If there are indications that the presence of the tape recorder makes the interviewee uncomfortable, consider</p>

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	currently under discussion in a project	<p>understanding of hard-to-measure concepts such as community participation, empowerment, and cohesiveness.</p> <p>Interviews can be used in all phases of the evaluation, but they are particularly useful when conducting implementation and context evaluation.</p> <p>Because interviews give you in-depth and detailed information, they can indicate whether a program was implemented as originally planned, and, if not, why and how the project has changed.</p> <p>This type of information helps policymakers and administrators understand how a program actually works. It is also useful information for individuals who may wish to replicate program services.</p> <p>One of the first steps in interviewing is to find knowledgeable informants; that is, people who will be able to give you pertinent information. These people may be involved in service activities, hold special community positions which give them particular insights, or simply have expertise in the issues you are studying.</p> <p>Informants can be clients, staff members, community members, local leaders,</p>	<p>taking handwritten notes instead. Tape recording is required only if you need a complete transcript or exact quotes.</p> <p>If you choose to focus your attention on the interviewee and not take notes during all or part of the interview, write down your impressions as soon as possible after the interview.</p>

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		<p>politicians, volunteers, or subject expert professionals.</p> <p>Depending on the type of information you seek, you may interview one or many different informants.</p> <p>In addition to finding informants, you must also decide which method of interviewing is most appropriate to your evaluation.</p>	
<b>Written Questionnaires</b>	<p>Written document that a group of people is asked to complete</p> <p>Can be short or long and can be administered in many settings and through many ways – written, online, verbal, etc.</p>	<p>Surveys can easily be administered to large groups of people and are usually easy to complete</p>	<p>Written survey questions are inappropriate if the respondents have low language literacy or are unfamiliar with the conventions surrounding survey completion.</p> <p>Here are a few simple rules to follow when developing a survey:</p> <ol style="list-style-type: none"> <li>1. Make the questions short and clear, ideally no more than 20 words. Be sure to give the respondents all the information they will need to answer the questions.</li> <li>2. Avoid questions that have more than one central idea or theme.</li> <li>3. Keep questions relevant to the problem.</li> <li>4. Do not use jargon. Your target population must be able to answer the</li> </ol>

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			<p>questions you are asking. If they are not familiar with professional jargon, do not use it.</p> <p>5. Avoid words which are not exact (e.g., generally, usually, average, typically, often, and rarely). If you do use these words, you may get information which is unreliable or not useful.</p> <p>6. Avoid stating questions in the negative.</p> <p>7. Avoid introducing bias. Slanted questions will produce slanted results.</p> <p>8. Make sure the answer to one question relates smoothly to the next. For example, if necessary add “if yes...did you?” or “if no...did you?”</p> <p>9. Give exact instructions to the respondent on how to record answers. For example, explain exactly where to write the answers: check a box, circle a number, etc.</p> <p>10. Provide response alternatives. For example, include the response “other” for answers that don’t fit elsewhere.</p> <p>11. Make the questionnaire attractive. Plan its format carefully using subheadings, spaces, etc. Make the survey look easy for a respondent to</p>

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			complete. An unusually long questionnaire may alarm respondents. 12. Decide beforehand how the answers will be recorded and analyzed.
<b>Tests and Assessments</b>	Tools that assess health status, knowledge, behavior, attitude or achievement	Allow you to gain information about the needs of the target population. In outcome evaluation, it can indicate changes in status or behavior resulting from project activities.	most of these measures require expertise and specialized training to properly design, administer, and analyze
<b>Document Review</b>	Internal or external documents that can inform process and outcomes i.e. logs, journals, grades, assignments, reports, home bills, usage information, etc.	What do document reviews help to support: 1) To gather background information - Reviewing existing documents helps you understand the history, philosophy, and operation of the program you are evaluating and the organization in which it operates. 2) To determine if implementation of the program reflects program plans – The review of program documents may reveal a difference between formal statements of program purpose and the actual program implementation. It is important to determine if such a difference exists and to clarify the program intent before moving forward with the evaluation. 3) When you need information to help you develop other data collection tools for evaluation - Reviewing existing documents	What are the disadvantages of document review? <ul style="list-style-type: none"> <li>• Information may be inapplicable, disorganized, unavailable, or out of date</li> <li>• Could be biased because of selective survival of information</li> <li>• Information may be incomplete or inaccurate</li> <li>• Can be time consuming to collect, review, and analyze many documents</li> </ul>

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		<p>to better understand the program and organization you are evaluating will help you formulate questions for interviews, questionnaires, or focus groups or develop an observation guide.</p> <p>4) When you need data to answer what and how many evaluation questions - Reviewing program documents is useful for answering basic evaluation questions related to the number and type of participants, number and type of program personnel, and program costs.</p> <p>What are the advantages of document review?</p> <ul style="list-style-type: none"> <li>• Relatively inexpensive</li> <li>• Good source of background information</li> <li>• Unobtrusive</li> <li>• Provides a behind-the-scenes look at a program</li> </ul> <p>that may not be directly observable</p> <ul style="list-style-type: none"> <li>• May bring up issues not noted by other means</li> </ul>	
<b>Others?</b>			

**When deciding between types of data collection, these questions may be useful:**

- Are the methods of data collection suitable for the target groups and the issues being assessed?
- Can the type of data collection chosen identify significant issues as well as the outputs and outcomes?
- How reliable is the measuring instrument, i.e. will it provide the same answers to the same questions if administered at different times or in different places?
- What are the advantages and disadvantages of each one of the available types of data collection?

**Key Terms to Understand**

***Validity***

- Refers to the essential truthfulness of a piece of data
- Instrument or method measures what it says it's measuring
- By asserting validity, you are asserting that the data actually measure or reflect the specific phenomenon claimed.
- *Are there any factors or intervening variables that should cause me to distrust these data?*

For example, if a survey of students claims to measure their engagement in school activities, then it should ask questions that address the extent to which they voluntarily commit time and effort to school-related endeavors. The keys here are the words “voluntarily” and “effort.” For example, we might ask how much time they devote to extracurricular activities (i.e., Do they spend more time in school than is required?) or what books they read for pleasure (i.e., Is the content of the books related to the content of the curriculum?). We shouldn't ask if they “like” school—we can like something (“I like having the TV on when I'm home”) without being engaged with it (“the TV is a nice background while I'm cooking dinner”).

***Reliability***

- Relates to your claim regarding the accuracy of your data.
- the instrument yields the same results on repeated trials. For example, a thermometer should read 212 degrees Fahrenheit every time it is placed in boiling water.

**Example:**

A few years ago, when a police officer issued me a ticket for speeding, I didn't question the validity of his using an expensive, city-issued speedometer. I was willing to concede to the officer the validity of measuring vehicular speed with a speedometer. However, I urged him to consider my thesis regarding the reliability of his speedometer. I respectfully suggested that although I knew he sincerely believed that his speedometer was accurate, he ought to consider the possibility that it could be damaged. I argued that if

it were broken it wouldn't produce an accurate, credible, and reliable measure of my speed. What I was suggesting was that although speedometers are valid measures of speed, they aren't always reliable.

Reliability problems in education often arise when researchers overstate the importance of data drawn from too small or too restricted a sample. For example, imagine if when I was a high school principal I claimed to the school board that I had evidence that the parents love our school's programs. When the board chair asked me how I could make such a claim, I responded by defensively asserting it was a conclusion based on "hard data"—specifically, a survey taken at the last winter band banquet. The board chair might respond that because that event was attended by only 5 percent of the school's parents and all the parents who attended had one thing in common—they had children in band—my conclusions were "unreliable." He would be right. Claiming that such a small and select sample accurately represented the views of a total population (all the school's parents) stretches the credibility of my assertion well beyond reasonableness.

To enhance the reliability of your action research data, you need to continually ask yourself these questions when planning data collection:

- *Is this information an accurate representation of reality?*
- *Can I think of any reasons to be suspicious of its accuracy?*

***Credibility:***

How credible will your evaluation be as a result of the methods that you have chosen? Would alternative methods be more credible and/or reliable, while still being cost effective?

When deciding between various methods and instruments, ask the following questions:

- Is the instrument valid? In other words, does it measure what it claims to measure?
- How reliable is the measuring instrument? Will it provide the same answers even if it is administered at different times or in different places?
- Are the methods and instruments suitable for the population being studied and the problems being assessed?
- Can the methods and instruments detect salient issues, meaningful changes, and various outcomes of the project?
- What expertise is needed to carry out your evaluation plan? Is it available from your staff or consultants?

## The Final Action Plan: Taking it Home

You have been exposed to many tools, concepts, and resources in a fairly short period of time. Now is the time to think about how you want to continue your own development in this topic by capturing your key learnings and committing to “homework assignments” for post-training work.

Thank you for your participation!

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**PRIORITIZE:** List **3 program pieces** you need to devote your time on improving first:

1)

2)

3)

**CONNECT:** List **2 resources (ideas or people)** you will follow-up with when you get back to your office:

1)

2)

**ACT:** List the **1<sup>st</sup> step** you are going to take when you get back to your place of work:

I will...

MY NOTES...

MY NOTES...

MY NOTES...