

Monitoring and Review Measuring Performance

Extract from Young People's Substance Misuse Commissioners Skills Development Manual

<http://www.drugs.gov.uk/WorkPages/YoungPeople/SubstanceMisuseServices/SDManualFinfin.pdf>

This extract from the Skills Development Manual looks at a variety of measures of performance which can be used. Several factors can be measured. The form provided is designed to record current measuring and monitoring activity and identify gaps. An example is shown for an advice service.

	What we measure now	What we need to do	Notes
How we use the input? E.g. Recording total expenditure on advice.			
The volume of the output E.g. How many hours of advice provided?			
The reaction of users to the output E.g. What did users think of the advice given?			

<p>Short term impact.</p> <p>E.g. Did the service deliver immediate results?</p>			
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<p>Longer term benefit</p> <p>E.g. Did the service produce longer term benefits?</p>			
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<p>The link between the outcome and need</p> <p>E.g. Did it meet its original objectives?</p>			
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Inputs, outputs and outcomes.

How does this framework apply to your organisation?

The activity is -

Inputs

- * money.
- * time.
- * other resources.

Outputs

- * services.
- * products.
- * events.
- * achievements.

Outcomes	
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- * impact.
- * benefits.
- * side effects.
- * results.

Notes:

The following are offered as useful starting points.

- **Does the organisation have clear objectives?**
 - Does the organisation have a clear sense of its purpose?
 - Does it have aims, objectives and goals that are clear and specific?
 - What is the mission?
- **Is there an agreement on what is important about how it should work**
 - Do committee members, staff and volunteers have a clear sense of shared values?
 - What is important about the way that you work?
- **Is the organisation managed in such a way that allows for good communication and sharing of information internally?**
 - The agreement of effective measures and standards will require people to communicate with each other and exchange information. How effective are internal communication systems?
- **Are there processes for reviewing and planning work?**
 - What will you do with the information and feedback collected?
 - Do the people who manage the organisation have the time and skill to use it properly?
- **Do you know why funding bodies fund you?**
 - What are the expectations of the bodies that fund or purchase your services?
 - Do you share the same objectives and values?

Examples of Performance Measures are:

Unit Cost	Communications audit
Cost of overheads	User panels
Occupancy rate	Case audits
Take up rate	Follow up reviews
Performance against agreed standard	Matching expectations with post experience
Performance against an agreed plan	Policy indicators
User feedback	Referral indicators
	No service given

This is a checklist for using performance measures

Are the Measures:

Related to a specific function or activity.	Agreed in Advance
Capable of being managed or improved	Easy to collect
Measurable	Easy to understand
Reflecting an even and total picture.	Linked into planning
Related to values and objectives	Cost effective.

It is easy to interpret a simple piece of information in many different ways. Most performance review systems do not have an explicit statement of what kind of interpretation will be placed on the collected information. It may be appropriate to agree to a regular review meeting to look at trends and patterns that emerge from indicators, discuss possible interpretations and identify future action. Examples of performance measurers are provided:

Example

The following fifteen measures have all been used by different agencies to monitor performance. The description show their possible use and the notes comment on the positive and negative implications of using them.

Type	Description	Notes
Unit Cost	<u>Cost of Service</u> Number of times used	If a home visiting service cost £6,000 each month and in a particular month carried out 120 visits the unit cost would be £50. Unit costs only make sense if every unit is likely to

<p>Cost of Overheads</p>	<p>Amount of money spent on running costs and administration as opposed to direct service costs.</p>	<p>be relatively similar. If one home visit takes 10 minutes and another takes 3 hours, then the figure of £50 becomes a fairly meaningless average.</p> <p>Assumes that the agency's financial procedures are able to report this information in an accurate and true manner. Can lead to "creative accounting".</p>
<p>Occupancy rate.</p>	<p><u>Optimum Use</u> Actual use</p>	<p>If an arts centre had workshop space for three sessions a day its optimum use level would be sixty sessions in a four week period. If, in one period, it was used for fifty sessions that its occupancy rate would be 83%.</p>
<p>Take up rate</p>	<p>Number of clients, enquiries or users.</p>	<p>Numbers of service users, often broken down further into client profile (age, sex etc.), type of issue or time taken to deal with. Can provide useful information about trends in service use provided interpretation is fair. Often only records how busy the service is rather than how effective it is.</p>
<p>Performance against agreed standard</p>	<p>Numbers of time that a service has met or failed to meet an agreed minimum level.</p>	<p>Often used as part of a quality assurance framework. An agreed "benchmark" is set, e.g. "all initial referrals will be dealt</p>

standard	minimum level.	with in four days". Can be used as a negative indicator to identify when a service is not working to standard.
Follow up reviews	A random sample of past users and clients are contacted to comment on their experience of the service.	Some agencies have developed techniques for keeping in touch with ex-users and tracking their experience.
Matching expectations with post experience	Organised recording of users initial hopes about a service contrasted against their experience of using it.	Asking trainees to record what they hope to learn from a course and comparing it with their experience on completion of it.
Policy Indicators	A positive report on what actions and resource allocations have been given to advancing policy commitments.	An agency would report on how much time and money it had spent on responding to a policy. For example, what it did to implement its anti-racist policy in the past six months?
Referral Indicators	A report on how users first made contact with the service.	An indicator of how users found out about a service by referral routes.

No service given

A report on the occasions when the agency has had to turn potential users away.

Recording demands for a service which were not met. Lost opportunities can also be recorded, "...no available staff time prevented us from....".

Performance against an agreed plan

Reporting on the completion of objectives and tasks.

A plan of work is agreed with written objectives and timescales. Can be useful in activities of a developmental nature e.g. community work. One possible way to avoid the plan becoming too rigid is to build in flexibility by only planning for say 70% of time.

User feedback

Collation of user opinions, reactions and surveys.

Organised collection of the views of users. Thought needs to be given as to who should collect the information and also collecting the views of ex-users.

Communications audit

A survey of an organisations' users to measure their knowledge of it's services and activities

A review of how effectively the organisation informs users about its work. Simple direct questions e.g. "Is there a complaints procedure?"

User Panels	Establishing small groups of users, and clients to comment on services	A more open evaluation technique. Panels act as a point of reference for reviewing the service.
Case audits	Internal and external analysis and reviews of a limited number of cases to ensure that it has been managed in line with agreed practice.	Audits need to have clear standards of what is good practice. Cases could be audited by managers, other staff or independent experts. Clearly confidentiality would need to be managed.

This element explores using Value for Money to make judgments. Most Value for Money studies are used to make a comparison which is sometimes a difficult exercise. Some of the more typical comparisons are:

- Could it be provided on a cheaper basis elsewhere?
- Have more outputs been delivered this year compared to last year?
- Do similar organisations manage to provide the same services at less cost?
- Could the same value be achieved by providing a different (and possibly cheaper) service?