

# WORKSHEET 1: Resource Assessment/Assignment and Delegation

## Considerations:

- Consider all forms of resources required – human (internal and external capacity or expertise), financial, systems and infrastructure (e.g., databases, technology, processes/procedures), and other
- Consider current capacity and where opportunities exist to add, realign or import resources (e.g., grants, State funding, partnerships)
- Designate 'lead' accountability (staff and BOS as appropriate) and 'secondary' accountability, where coordination or support will be required (building communication and collaboration *across* the organization)

Plan Priority	Resource Assessment	Lead Accountability			Secondary Accountability
		BOS	Dept/Staff	Other	

**Tools:** charges (expected deliverables, resources available, reporting requirements, etc.); work plans

# WORKSHEET 2: Monitoring and Reporting

**Considerations:**

- Set a regular schedule for plan progress review (e.g., three to four times a year)
- Focus reporting time on those items that need Board discussion, further direction, additional resources, a change in strategy, etc.
- Produce information in a simple, clear, visual/at-a-glance – and consistent -- format
- Anticipate/address issues or red flags to stay on track
- Celebrate accomplishments! Recognize contributions and performance!

	Audience 1: BOS	Audience 2:	Audience 3:
When/How Often			
By Whom			
Content			
Format			
Other			

**Tools:** dashboard

## WORKSHEET 3: Measurement

### Considerations:

- Start slow and keep it simple: 1) develop and track a couple of measures, 2) report once a year as part of the information to consider when updating the plan
- Assign clear responsibility for gathering measurement data and reporting
- Start with measures that already exist!
- Add to the process as gain experience and value

### Qualities of Effective Performance Measures

- |   |   |
|---|---|
| • linked directly to the milestone or end result desired        | • acceptable to all as a management tool                                      |
| • measures the most important aspects of desired performance    | • reliable, credible  |
| • compatible with existing information sources, databases, etc. | • feasible to assess (e.g., time, dollars); start with existing data/measures |

### Measurement Process

1. Define success in meeting the milestone
2. Determine what you are trying to measure
3. Set the best measure of success (*how can we tell?*)
4. Determine the best means to measure (consider measures that already exist)
5. Assess feasibility of those means
6. Identify measurement logistics: what, when, how, who
7. Plan to use the measures for decision-making (how, when, by whom)
8. Routinely assess the value of the process and adjust as needed

# Brainstorming Effective Measures

Priority Plan Issue/Milestone:		
<b>What Does Success Look Like?</b>	<b>What Are We Trying to Measure?</b>	<b>The Best Measure of Success</b>
✖	✖	
✖	✖	
✖	✖	

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