

Strategic Planning and Creating Measures that Matter

Melissa Levy

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ME

HELLO
my name is

YOU

HELLO
my name is

U.S.

Introductions

Objectives

- Be exposed to a unique process that will assist you in identifying shared goals.
- Learn and apply a measurement vocabulary
- Practice effective communication skills
- Experience indicator analysis in a systems context.
- Discover key leverage points that will provide focus for measures and actions.
- Learn to identify key assumptions.
- Learn how to create meaningful measures.

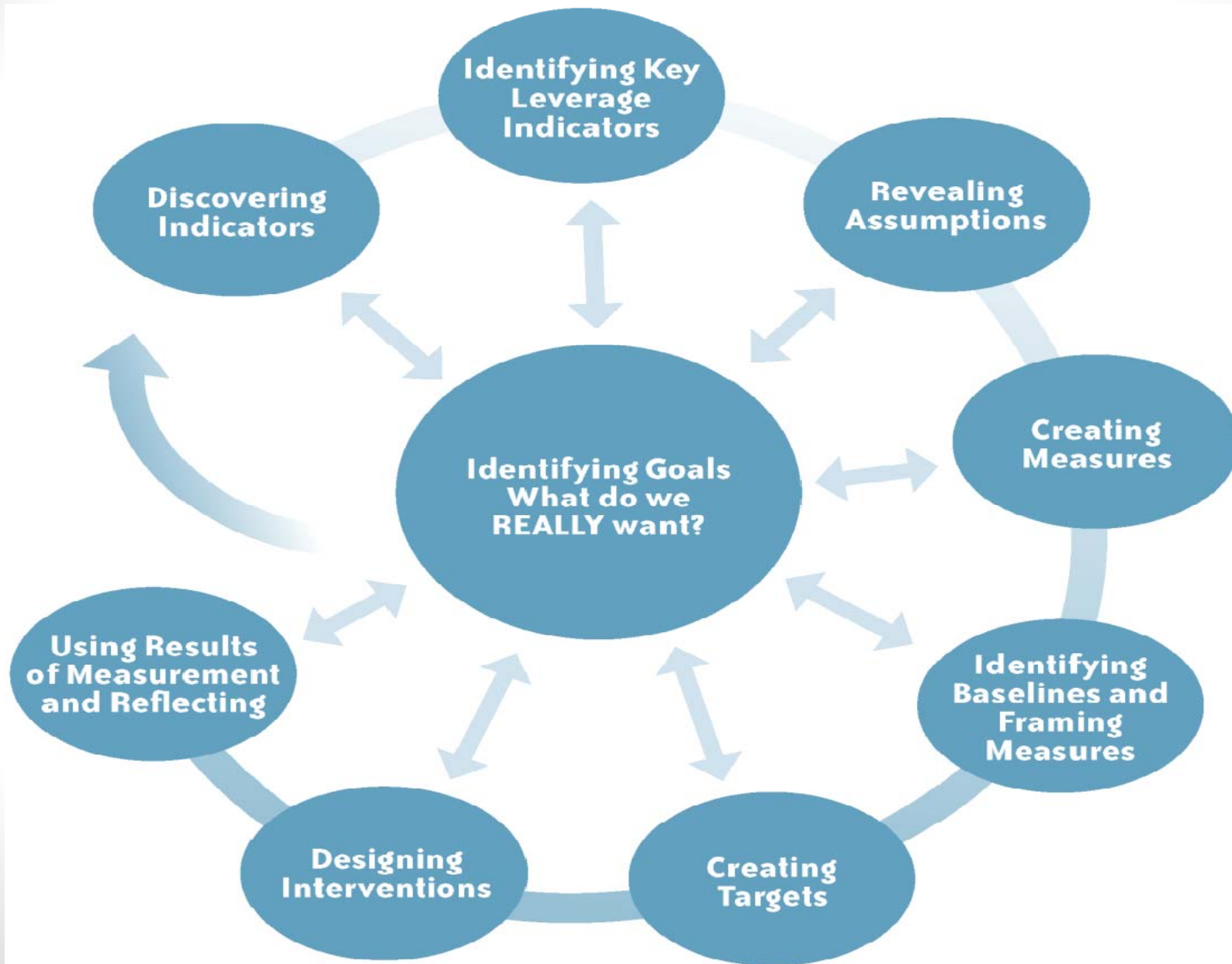
Why Measure?

- ⇒ Fuels continuous learning through reflection
- ⇒ Creates new information and new patterns of information flow
- ⇒ Captures results of risk and experimentation
- ⇒ Supports constructive self-organizing behavior
- ⇒ Can lead to new and unprecedented conversations, particularly with information gatekeepers

Exercise: Everyday Measures



- ⇒ List a few things that you count or measure as part of your daily life (not connected to work).
- ⇒ Think about how you measure them and what kinds of decisions or actions you take based upon the measurements.



Vocabulary: Goal

A goal is a condition that you wish to achieve. A goal is not an action. It is not about doing or making; it is about **being**.

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Achieving a goal requires a change in the way your organization or your community looks, feels, and acts.

Stakeholders

- Those whose cooperation is essential to reaching your goal.
- Those who are in a position to prevent you from reaching your goal.
- Those who will be affected as you make progress toward your goal.

greatbiggraphics

Case study

- Review the case study
- Choose a stakeholder role to play for the rest of the workshop (farmer, community member, local government, etc.)



Vocabulary: Indicator

An indicator is something that must be changed, or a condition that must be achieved, in order to claim that progress is being made toward a goal.

Since goals are generally quite broad,
there are many possible indicators that
could suggest progress toward the goal.

What needs to change?

In what direction?

What Makes a Good Indicator?

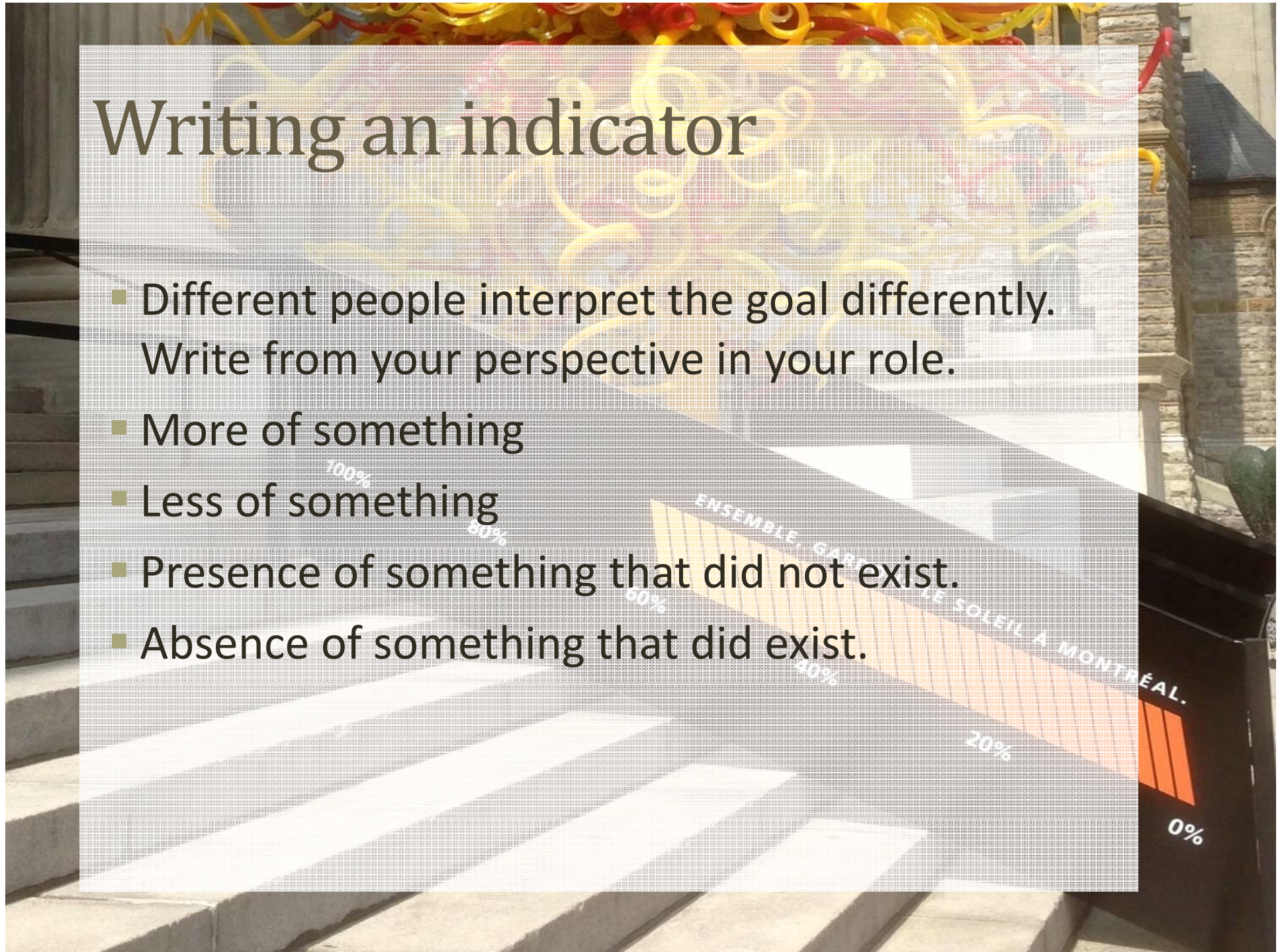
If the goal is:

Everyone in our community can find rewarding work.

- Useful indicator: The number and diversity of work opportunities in our community are increasing.
- Less useful: Number of jobs in our community.

Writing an indicator

- Different people interpret the goal differently.
Write from your perspective in your role.
- More of something
- Less of something
- Presence of something that did not exist.
- Absence of something that did exist.



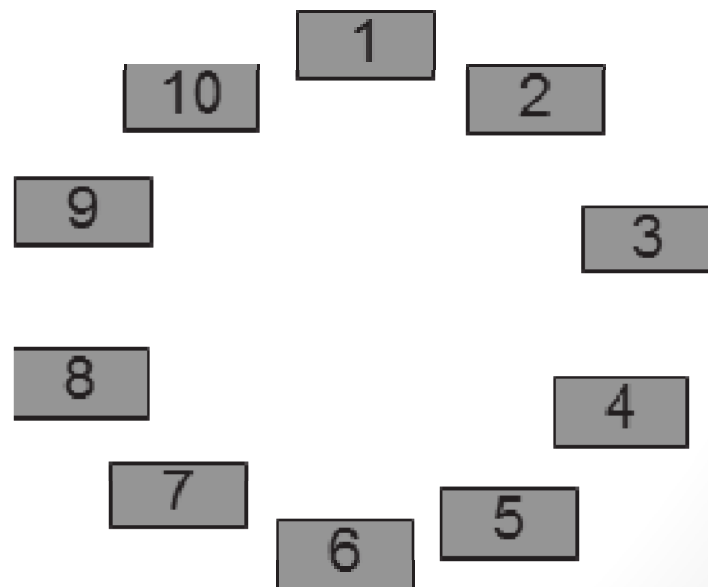
Exercise:

Write an Indicator

- Write one indicator for the goal at your table from your perspective on a sticky note. What needs to change to get to the goal? And in what direction?
- Each person shares their indicator with the rest of their group. There are no “bad” indicators.
- Others at the table can ask clarifying questions to understand what the person means.

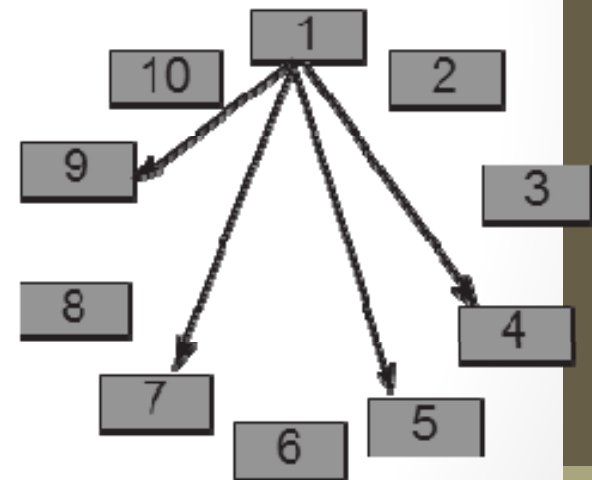
Indicator Analysis

1. Arrange the indicators in a circle on a large sheet of paper
2. Number each indicator, beginning with number 1 in the 12 o'clock position.



Indicator Analysis

- Beginning with indicator 1, examine its relationship to each indicator around the circle.
- Ask **“If indicator 1 were to move in the desired direction, would it cause indicator 2 to change for the better?”**

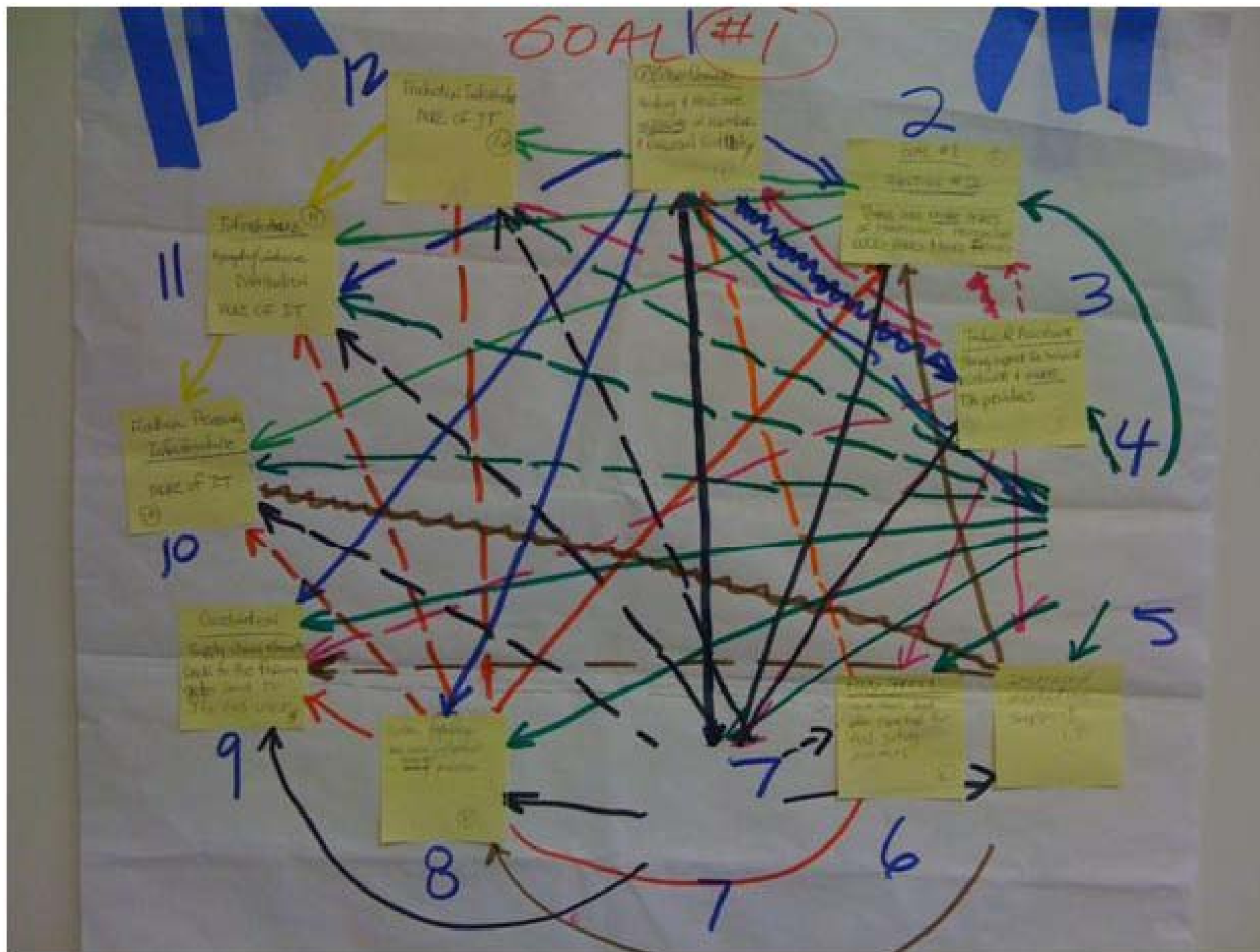


Your decision

For each relationship on the analysis:

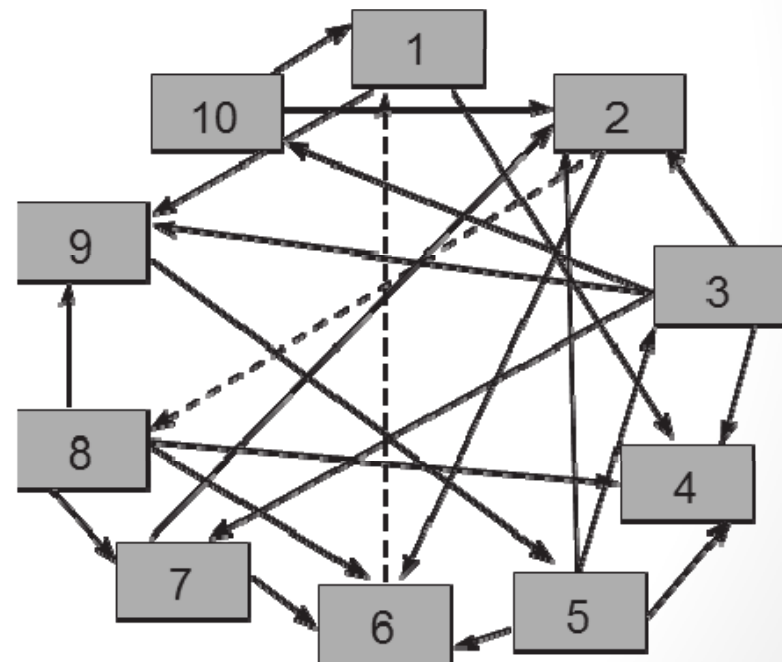
- Strong relationship – solid line
- Weak relationship – dotted line
- No relationship – no line





Analyzing your diagram

1. Count # of outgoing arrows from each indicator. (Solid out, dotted out)
2. Count # of incoming arrows for each indicator. (Solid in, dotted in)



Analyzing your diagram

- Indicator with most arrows out-going:

Key Leverage Indicator

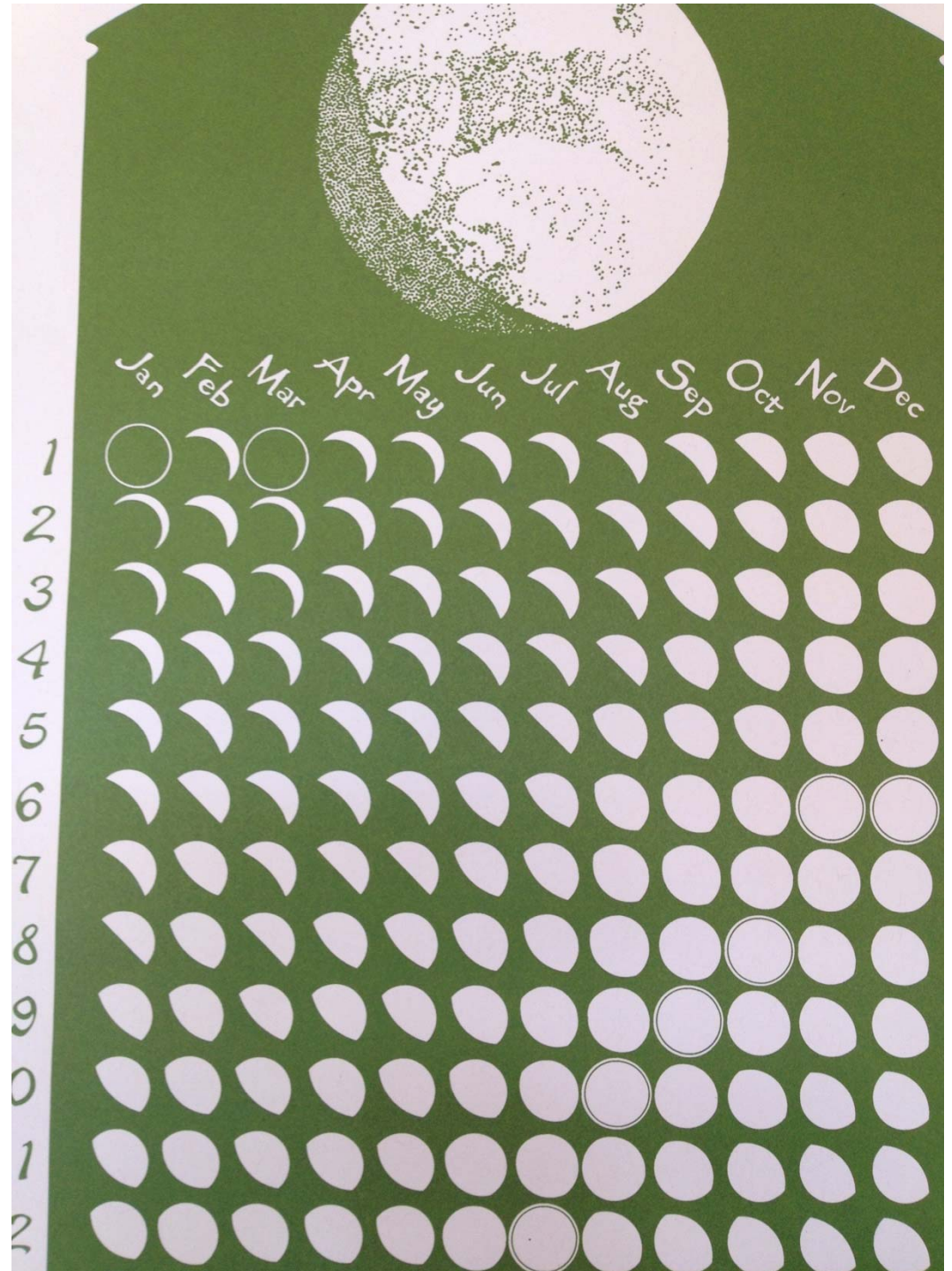
- Indicator with the most arrows in-coming:

Key Results Indicator

Measure

A measure provides a way to actually count or value the status of an indicator.

For example, things may be measured in terms of “number of,” “percent of,” “quality of,” “frequency of,” or “rating of.”



Steps to Developing a Measure

1. Define the terms in your indicator so that everyone knows what they mean.
2. Determine the baseline. This is the first time you measure it.
3. Determine the unit. What are you measuring? People, percentages, miles, etc.
4. Ensure a strong connection between the measure, indicator and goal.





Choosing Sample Measures

1. What has to happen for it to “count” as progress toward the goal?
2. What are the behavioral changes that indicate progress?
3. What is the baseline that meet the definitions?

Using the Results of Measurement

Rule #1:

If you don't know how you are going to use information, don't collect it. Consider using information to influence decision-makers, educate stakeholders, improve interventions.

Rule #2:

Collect information that will be most relevant and useful in achieving your goal. The more closely your measures are tied to your interventions, the more useful they will be. Don't try to measure too much.

For More Information

Melissa Levy
Community Roots LLC
Hinesburg, Vermont
802-318-1720



melissa@community-roots.com

www.community-roots.com