

Maximizing the

Results Scorecard™ 2.0

A comprehensive guide to using the Results Scorecard for:

*Strategic Planning ♦ Community Collaboration
Grant Management ♦ Staff Management*

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*D*esigned by the Results Leadership Group and based on the principles of Mark Friedman's Results-Based Accountability™ framework, the Results Scorecard™ helps public-sector leaders to collaborate, make data-driven decisions, and align the performance of their programs and initiatives with the impact that they create in the community.



Transparent, Collaborative, and Data-Driven Decision Making

Chapter 1:

Executive Summary

In an environment characterized by increasingly scarce resources and complex social problems, communities, government agencies, service systems, and individual programs face unprecedented pressure to improve quality and demonstrate their contribution to positive outcomes. Results-Based Accountability™ (RBA) is a framework that outlines a process designed explicitly to help public and non-profit sector leaders, organizations, and systems navigate this daunting challenge. RBA encourages users to begin with “ends” – i.e., results – and then helps them work backwards toward “means” – i.e., the strategies and actions necessary to move an indicator in a desired direction.

The process is proven to help users:

- Establish results and select key indicators for monitoring achievement toward the results;
- Develop aligned, data-driven strategic plans with specific action steps and task holders;
- Track performance in real and over time; and
- Celebrate successful “Turn the Curve” efforts, and, whenever appropriate, make strategic and tactical adjustments to get back on track.



In recent years, organizations in 40 states and 11 countries, including government agencies, human service systems and individual programs have successfully deployed RBA to “turn the curve” on both population and program level results.

The Results Scorecard™ (Scorecard) is a powerful, web-based application designed to support effective use of the RBA framework. The Results Scorecard enables RBA users to quickly, intuitively, and collaboratively:

- Define and align results, indicators, and improvement activities;
- Monitor improvement plan implementation and track impacts across programs, and ultimately results; and
- Identify successful strategies and recalibrate unsuccessful ones.

Because the Results Scorecard was engineered around the RBA framework, it is fully capable of supporting accountability initiatives at both the population and performance levels. In fact, users throughout the United States, Australia, UK, New Zealand, and Canada are increasingly using the Results Scorecard to capture their RBA work to:

- Develop, implement, and evaluate results-driven strategic plans;
- Organize and manage comprehensive community change efforts;
- Automate grant monitoring and reporting; and
- Drive results-focused staff development and management routines.

To discover how RBA and the Results Scorecard can help you work smarter and measurably improve results for your customers and community, visit www.resultsleadership.org or contact Justin Miklas at the Results Leadership Group at: 301.907.7541 or justin@resultsleadership.org.

- ✓ Results are articulated.
- ✓ Indicators are tracked.
- ✓ Strategies are outlined.
- ✓ Performance measures are clear.



Results-Based Accountability™ Software for Public Sector Leaders

Chapter 2:

Results Scorecard for Strategic Planning

Results-Based Accountability™ (RBA) is a framework that outlines a process for disciplined thinking and taking action. Community leaders, government agencies, nonprofits, and other organizations can use RBA to develop strategic plans and manage continuous improvement efforts. The RBA framework starts with ends (results) and works backwards toward means (strategies and tactics for improving population results and program outcomes). Organizations throughout the world use RBA to specify, orient, and coordinate population- and program-level activities in ways that enable them to pursue measurable impact at both levels.

To capture their work, organizations have adopted the Results Scorecard™ (Scorecard), which is a web-based strategic data system designed to enhance the usability and sustainability of RBA as a strategic planning process. The Scorecard allows you to build a results-based strategic plan that is interactive, highly visual, and maintains real-time data. Moreover, strategic planning processes are iterative, and therefore require regular performance feedback to help leaders adjust, refine, and ultimately increase the effectiveness of their population- and program-level improvement initiatives. Having the strategic plan laid out in the Scorecard supports the planning process, allows for multiple people to be involved, and reinforces the call to action and accountability. (See example on the following page.)



As you can see in the example below, the Bethesda County Health Department (BCHD) has identified three results around which each of their departments will align their programs.

Result One: People are Healthy

The screenshot shows the 'Population Results' section for 'People are healthy'. It contains a table with 8 rows of metrics. The columns are Name, Prior Period, Current Value, Change, Most Recent Period, and Comments/Projects. The 'Change' column uses color-coded arrows to indicate trends: green for improvement, red for decline, and black for no change.

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
BCHD: Adults who smoke	15.4%	10.6%	Green arrow down	1	2009
BCHD: Adult fruit and vegetable consumption	N/A	23.1%	Black circle	0	2007
BCHD: Adults who are overweight or obese	64.9%	67.4%	Red arrow up	2	2009
BCHD: Adults who are sedentary	N/A	35.4%	Black circle	0	2007
BCHD: Hypertensive heart disease death rate	11.8	13.4	Red arrow up	1	2009
BCHD: Diabetes death rate	23.5	23.5	Black arrow right	1	2009
BCHD: Adult asthma hospitalization rate	16.2	16.3	Red arrow up	1	2008
BCHD: Stroke death rate	32.8	31.3	Green arrow down	4	2009

Result Two: Youth have Healthy Behavior

The screenshot shows the 'Population Results' section for 'Youth have healthy behavior'. It contains a table with 5 rows of metrics. The columns are Name, Prior Period, Current Value, Change, Most Recent Period, and Comments/Projects. The 'Change' column uses color-coded arrows to indicate trends: green for improvement, red for decline, and black for no change.

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
BCHD: Teen fruit and vegetable consumption	23.6%	24.9%	Green arrow up	2	2009
BCHD: Teens who engage in regular physical activity	N/A	36.0%	Black circle	0	2009
BCHD: Teens who are overweight	28.0%	26.4%	Green arrow down	1	2009
BCHD: Pediatric asthma hospitalization rate	21.9	19.8	Green arrow down	1	2008
BCHD: Teens who smoke	11.2%	13.9%	Red arrow up	1	2009

Result Three: All Babies are Born Healthy

Once results and indicators are specified, the Results Scorecard enables each sector of the BCHD to align its efforts by delineating its contributions and tracking its performance. This functionality allows plan developers to be clear about who is responsible for particular improvements and provides a common, real-time platform for monitoring performance. The functionality also allows program/project leads to efficiently and effectively publicize their successes, and, whenever necessary, modify strategies and tactics to improve contribution and impact.

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
BCHD: People are healthy					
BCHD: Youth have healthy behavior					
BCHD: Babies are born healthy					
BCHD: Mothers who receive early prenatal care	83.8%	85.0%	2 (Green arrow up)	2009	
BCHD: Babies born with low birth weight	9.0%	9.0%	1 (Grey arrow right)	2009	
BCHD: Infant mortality rate	5.8	4.4	1 (Green arrow down)	2010	
BCHD: Caesarean rates	47.0%	48.5%	2 (Red arrow up)	2008	

Community Health and Planning

The image below illustrates how the Community Health and Planning department of Bethesda County Health aligned its programs with the results.

- Community Health & Planning
 - Consortium for a Healthier Miami-Dade
 - Worksite Wellness
 - Chronic Disease Prevention
 - Tobacco Prevention and Control
 - Healthy Start Data Management
 - CHAT
 - CH&P Administration

Worksite Wellness Scorecard

Home Scoreboard Reports Scorecard Builder Administration

Start Again Data Driven Decisions Data & Projects Organize Data Users, Data Import, Set up

Worksite Wellness
Edit Mode Make Default Print to PDF

Expand All | Collapse All
Scorecards: Worksite Wellness

Population Results

Program Performance

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
CH&P: Worksite Wellness					
CH&P: # of classes performed	78	94	▲ 2	2011	
CH&P: # screened, educated, and counseled	224.0	265.0	▲ 1	Q1 2012	
CH&P: # of employees who participate in worksite wellness activities	45.0	45.0	→ 1	Q1 2012	
CH&P: % employees satisfied with services	69%	78%	▲ 1	Q1 2012	
CH&P: % Lifestyle change	76%	65%	▼ 1	Q4 2011	

Chronic Disease Prevention Scorecard

Chronic Disease Prevention
Edit Mode Make Default Print to PDF

Expand All | Collapse All
Scorecards: Chronic Disease Prevention

Population Results

All Hazards Preparedness Plans

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
CH&P: Chronic Disease Prevention					
CH&P: % of environmental changes from workplans	58.0%	54.0%	▼ 1	Q4 2011	
CH&P: % assessments completed	68.0	78.0	▲ 1	2011	
CH&P: # of health fairs requested	12.0	14.0	▲ 1	Q4 2011	
CH&P: # of health fairs attended	6.0	10.0	▲ 1	Q4 2011	
CH&P: # of classes performed	12	11	▼ 1	2011	
CH&P: # screened, educated, and counseled	334.0	358.0	▲ 1	Q4 2011	
CH&P: % Lifestyle change	48%	48%	→ 1	Q3 2011	
CH&P: % EARS Response	72	76	▲ 1	2011	

Tobacco Prevention & Control Scorecard

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
CH&P: % of environmental changes from workplans	42.0%	38.0%	↓ 1	Q4 2011	
CH&P: # of classes performed	232	264	↑ 1	2011	
CH&P: # SWAT clubs	12.0	12.0	→ 1	Q4 2011	
CH&P: # of quitline referral	52.0	48.0	↓ 1	Q4 2011	
CH&P: % Lifestyle change	68%	74%	↑ 1	Q4 2011	
CH&P: % EARS Response	84	88	↑ 1	2011	

Create Projects and Manage your Work

Additionally, the Scorecard allows users to create projects to track and manage their action plans related to their performance efforts.

Prefix	Name	Status	% Complete	Assigned to	Actions
PHPP	All hazards preparedness plans	On-Track	100%	Adam Luecking	Actions
CH&P	Communities Putting Prevention to Work	On-Track	50%	JaNay Queen	Actions
CH&P	Consortium for a Healthier Miami-Dade	On-Track	50%	DeMonta Whiting	Actions

Medical Records Review

Even the Medical Records Review department can clearly articulate and align its efforts and capture its performance measures in the Scorecard. Ultimately, the Scorecard is a “living” strategic planning tool within an organization. It allows leaders to transform a strategic plan into a legitimate and sustainable performance management system that is available wherever and whenever they need as long as they have access to the internet.

The screenshot displays a web-based Scorecard for 'Medical Record Review'. The interface includes a navigation bar with the following items: Home (Start Again), Scoreboard (Data Driven Decisions), Reports (Data & Projects), Scorecard Builder (Organize Data), and Administration (Users, Data Import, Set up). Below the navigation bar, there are options for 'Edit Mode', 'Make Default', and 'Print to PDF'. The main content area is titled 'Medical Record Review' and includes a dropdown menu for 'Scorecards: Medical Record Review'. The primary data is presented in a table under the heading 'Program Performance'.

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
MDCHD: Family Planning Medical Record Review					
MRR: % Family Planning medical records in compliance	95.0%	98.0%	↑ 1	Q1 2012	
MRR: % Family Planning HIPAA form complete and correct	100.0%	100.0%	→ 4	Q4 2011	
MRR: % Family Planning eligibility completed	100.0%	100.0%	→ 4	Q4 2011	
MDCHD: Immunization Services Medical Record Review					
MDCHD: School Health Program Medical Record Review					
MDCHD: Refugee Health Assessment Program Medical Record Review					
MDCHD: TB Control and Prevention Program Medical Record Review					
MDCHD: STD Prevention and Control Program Medical Record Review					

Turn the Curve Thinking in Strategic Planning

Access alone, however, is not sufficient. Stakeholders also need tools and methods for developing a holistic picture of community and client conditions as well as digging beneath performance data to get to the “hows” and “whys”. The Scorecard’s interactive **Turn the Curve** template enables stakeholders to have disciplined and focused conversations regarding plan implementation and progress.

Turning the Curve

BCHD: People are healthy
Display Settings
Apply

BCHD: Adults who are overweight or obese
 Edit Print

Time Period	Actual Value	Forecast
2013		75.3%
2011		72.0%
2009	67.4%	
2007	64.9%	
2005	61.2%	

Story Behind The Curve

Over the past 20 years, our nation has experienced a dramatic increase in obesity among our adults and youth. According to the cdc, in 2010, there was no state with a prevalence of obesity less than 20%. In Bethesda County, this trend mirrors the national rates.

<http://www.cdc.gov/obesity/data/trends.html>

Partners

- Employers
- Churches
- Libraries
- Insurance Companies
- Sport and Fitness Clubs
- Schools

What Works

- Education
- Accessibility to healthy foods
- Making healthy foods affordable
- Communicating the benefits of healthy living
- Communicating the consequences of obesity
- Requiring healthy meals for children may influence parents' personal decisions and choices

Strategy

Chronic Disease Prevention Campaign

Projects Actions

Name	Status	% Complete	Assigned to	Due Date	
CH&P: Communities Putting Prevention to Work	On-Track	50%	JaNay Queen	03/30/2012	Actions
CH&P: Consortium for a Healthier Miami-Dade	On-Track	50%	DeMonta Whiting		Actions

Here, leaders can outline the contributing and restricting factors for the data baseline.

Here, leaders can identify who has a role to play in turning the curve in the right direction.

Here, leaders can ascertain what works to get curves turned in the right direction.

Here, leaders list an action or collection of actions that has a reasonable chance of impacting the result.

Chapter 3:

Results Scorecard for Community Collaboration

Community change efforts can succeed and be sustained when government agencies, businesses, nonprofits, and community stakeholders collaborate for collective impact. The process of organizing effective cross-sector coalitions, however, is far easier said than done. Too often such coalitions are rendered ineffective by competing agendas, unaligned goals, and siloed performance management languages and systems. However, with the Results Scorecard, facilitating collaborative efforts has become manageable, in that communities can use the tool to accomplish the following:

- Determine a common vision (shared results);
- Provide a visual profile of their community conditions that inspires a need for change;
- Conduct an in-depth exploration of the “story behind the data” in your community;
- Strategically plan in a coordinated manner to align programs across participating agencies;
- Identify and communicate what is working in your community and what is needed; and
- Monitor and help to improve the organization.

Altogether, the interactive Scorecard improves leaders’ abilities to support and sustain results-based community change and collective impact efforts. Below is an example of a community’s clearly defined results and indicators; relevant programs and performance measures; and report on progress, performance, and effectiveness of efforts.



Visually Communicate Community Conditions by Reporting Results & Indicators

Home Scoreboard Reports Scorecard Builder Administration

Start Again Data Driven Decisions Data & Projects Organize Data Users, Data Import, Set up

South East DC Community Collaboration
Edit Mode Make Default Print to PDF Embed

Expand All | Collapse All
Scorecards: South East DC Community Collaboration

Population Results

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/ Projects
SEDC: Children enter school ready to learn					
SEDC: Kindergarten entry assessment scores	79.0	80.0	↑ 2	2010	
SEDC: Families are economically self-sufficient					
SEDC: Unemployment rate	17.0	18.5	↓ 2	2010	
SEDC: Child poverty rate	19	18	↓ 3	2010	
SEDC: The Southeast District of Columbia is safe					
SEDC: Violent Crime: Rate per 100,000	511	501	↓ 2	2010	

Map and Track Partners' Program Performance

The Results Scorecard is optimized to make performance data readily available to community members, which enables them to build a culture of transparency and accountability.

South East DC Community Strategies Scorecard
Edit Mode Print to PDF Embed

Expand All | Collapse All
Scorecards: South East DC Community Strategies Scorecard

Program Performance

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/ Projects
Southeast: Community College					
Southeast: How Much: # of students that volunteer for ECE programs	49	50	↑ 3	Q4 2010	
Southeast: How Much: # of hours volunteered	1000	1000	→ 1	2009	
Southeast: How Well: % of students entering the ECE workforce	22%	22%	→ 1	2009	
Southeast: Child Protection Offices					
Southeast: How Much: # of child abuse cases	116	115	↓ 2	2009	
Southeast: How Well: % of cases responded to within 24 hours	99%	99%	→ 5	2009	
Southeast: Better Off: % of cases with repeat abuse and neglect	52%	51%	↓ 1	2009	
CDC: Community Development Corporation					
CDC: How Much: # homes sold to low-mod buyers	89	101	↑ 2	2011	
CDC: How Much: # homes repaired	211	237	↑ 2	2011	
CWF: Center for Working Families					

Turn the Curve Thinking in Community Collaboration

Use Turn the Curve Thinking to monitor, manage, and report on each program's performance and impact.

x

Turning the Curve

Southeast: Child Protection Offices

Display Settings ▾
Apply

Southeast: Better Off: % of cases with repeat abuse and neglect

Edit
Print

Time Period	Actual Value	Forecast
2012		54%
2011		53%
2010		52%
2009	51%	
2008	52%	
2007	52%	
2006	51%	
2005	49%	
2004	48%	

About Actual Values

Time Period	Actual Value	Forecast	Comments	Created By	Created On	Edit
2009	51%		After the big investment last year, this was supposed to get a LOT better. It barely improved!	Ulrich Nielsen	03/06/2010	
2007	52%		Please verify that these are the correct numbers.	JaNay Queen	01/05/2012	

Story Behind The Curve Edit

Story Behind the Curve:

- The **poor economy** adds to household stresses
- Required training after first offense doesn't address coping mechanisms for parents
- Lack of support network to help when there are high-risk situations

Partners Edit

County Workforce Development Office, Volunteers, Parents

What Works Edit

Better initial screening and decisions on placements

Action Plan Edit

- Do random follow-up visits to homes to assess safety
- Develop a more intensive parent training program
- Partner with County Workforce Development Office for job training referrals

Chapter 4:

Results Scorecard for

Grant Management

A growing number of grant-making organizations use RBA to monitor, discipline the expenditure of, and improve social returns on their philanthropic investments. Correspondingly, a growing number of grantee organizations have embraced RBA as an efficient and effective framework through which to drive continuous improvement efforts, demonstrate value and impact, and, ultimately, attract additional investment in their programs and services. RBA benefits both grant-makers and grantees by giving them strategies and tools to:

- Establish clear, common expectations about the use of grant dollars;
- Define and align expected relationships between sponsored programs and services (“means”) and client outcomes (“ends”);
- Tell success stories and identify improvement priorities in terms of return on investment (ROI) and results that matter to the local community;
- Use the Scorecard to streamline and enhance the use of RBA for grant reporting and performance management in multiple ways, such as:
 - Drill down to any program and collect real time data about progress, performance, and projects;
 - Make the connection between population results and programs’ performance in multiple views;
 - Explain how the investments in certain strategies are beneficial to population results;
 - Use performance measures to support resource allocation decisions;
 - Reduce the use of paper by collecting grantees’ reports online; and
 - Expect continuous updates to allow for rapid data feedback.

The Results Scorecard enables grantmakers and grantees to define the expected relationships between and evaluate the relative contributions of programs to the impact on population results and indicators. Grantmakers can leverage this functionality to assess whether their program-specific investments are influencing population-level results in the expected direction. Grantees can use this functionality to publicize their successes or, when necessary, modify strategies and actions to make measurable improvements.

On the next few pages are some examples of how a local United Way aligns community results with programs and tracks their performance.

Example 1: Funded Programs Contributing to the Education Result



welcome, Janay Queen | Help | Logout | Change Password

[Home](#) Start Again |
 [Scoreboard](#) Data Driven Decisions |
 [Reports](#) Data & Projects |
 [Scorecard Builder](#) Organize Data |
 [Administration](#) Users, Data Import, Set up

Boy Scouts: After School Scouting

[Edit Mode](#) |
 [Make Default](#) |
 [Print to PDF](#) |
 [Embed](#)

Expand All | Collapse All Scorecards: Boy Scouts: After School Scouting

Population Results

Name	Same Period Prior Year	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
<div style="border: 1px solid #ccc; padding: 5px;"> CI: Education: All youth are ready for college, work and life </div>						
<div style="border: 1px solid #ccc; padding: 5px;"> CI: Headline: Percent of Youth that graduate from high school on time </div>	86.19%	86.19%	89.34%	▲ 2	FY2010	

Program Performance

Name	Same Period Prior Year	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
<div style="border: 1px solid #ccc; padding: 5px;"> P-BS: AFS: Boy Scouts: After School Scouting </div>						
<div style="border: 1px solid #ccc; padding: 5px;"> P-BS: AFS: 1. How much: Number of students </div>	308	375	382	▲ 5	Q1 FY2012	
<div style="border: 1px solid #ccc; padding: 5px;"> P-BS: AFS: 2. How well: Quality assessment rating </div>	60	60	60	→ 1	FY2012	
<div style="border: 1px solid #ccc; padding: 5px;"> P-BS: AFS: 3. Better off: Number of cub scouts and boy scouts who advance one rank after learning skills that foster a sense of personal achievement and esteem </div>	248	248	252	▲ 1	FY2012	
<div style="border: 1px solid #ccc; padding: 5px;"> P-BS: AFS: 3. Better off: Number of cub scouts and boy scouts who stay in the program for 4 consecutive years or longer </div>	206	206	210	▲ 1	FY2012	

Example 2: Funded Programs Contributing to the Income Result



Welcome, Ja'Nay Queen | Help | Logout | Change Password

Home Scoreboard Reports Scorecard Builder Administration

Start Again Data Driven Decisions Data & Projects Organize Data Users, Data Import, Set up

Catholic Charities: Refugee Cooperative Services

Edit Mode Make Default Print to PDF Embed

Expand All | Collapse All Scorecards: Catholic Charities: Refugee Cooperative Services

Population Results

Name	Same Period Prior Year	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
CI: Income: All families are economically self sufficient						
CI: Headline: Percent of lower income working families that are self sufficient	66.6%	66.6%	65.6%	↓ 2	FY2010	
CI: Increase income through access to education and employment						
CI: Secondary: Median Household Income	\$62,783	\$62,783	\$62,352	↓ 1	FY2009	
CI: Secondary: Unemployment Rate	5.5%	5.5%	6.4%	↑ 4	FY2010	
CI: Secondary: Number of young adults 16 -19 years either in the labor force (employed/unemployed) or enrolled in school	27623	27623	27565	↓ 2	FY2009	

Program Performance

Name	Same Period Prior Year	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
P-CC:RCS: Catholic Charities: Refugee Resettlement Program						
P-CC:RCS: 1. How much: Number of adults in the program	14	37	37	→ 1	Q1 FY2012	
P-CC:RCS: 3. Better off: Number of refugee adults ready for work	6	25	26	↑ 1	Q1 FY2012	
P-CC:RCS: 3. Better off: Number of refugee adults placed in a job	0	8	8	→ 1	Q1 FY2012	
P-CC:RCS: 3. Better off: Number of match grant clients placed in job within 180 days or less	0	3	2	↓ 2	Q1 FY2012	
P-CC:RCS: 3. Better off: Average wage at placement	\$0.00	\$9.74	\$8.98	↓ 1	Q1 FY2012	

Example 3: Funded Programs Contributing to the Health Result



Welcome, JaNay Queen | Help | Logout | Change Password

Home Scoreboard Reports Scorecard Builder Administration

Start Again Data Driven Decisions Data & Projects Organize Data Users, Data Import, Set up

Hospice: End of Life Care

Edit Mode Make Default Print to PDF Embed

Expand All | Collapse All Scorecards: Hospice: End of Life Care

Population Results

Name	Same Period Prior Year	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
CI: Health: All children & adults are healthy & avoid risky behavior						
CI: Headline: Percent of adults who reported their general health status as good to excellent	89.8%	89.8%	90.2%	↑ 2	FY2009	
CI: Children and adults have affordable and equitable health care						
CI: Secondary: Percent of adults with health insurance	89.6%	89.6%	88.7%	↓ 1	FY2009	
CI: Secondary: Percent of children with health insurance	95.2%	95.2%	96.6%	↑ 2	FY2009	

Program Performance

Name	Same Period Prior Year	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
P-H: ELC: Hospice: End of Life Care						
P-H: ELC: 1. How much: Number of individuals served	628	311	596	↔ 1	Q1 FY2012	
P-H: ELC: 1. How many: Number of eligible individuals who receive financial/charitable assistance	27	20	37	↔ 1	Q1 FY2012	
P-H: ELC: 3. Better off: Number of people who die in their place of choice	277	246	264	↑ 1	Q1 FY2012	
P-H: ELC: 1. How many: Number of contacts with family caregivers	585	581	582	↔ 2	Q1 FY2012	

The Results Scorecard provides a collaborative online workspace where grant-makers and grantees can:

- ✓ Map driver relationships between grantmaking, program action plans, and results;
- ✓ Collect and profile grantee performance data, and;
- ✓ Make more strategic decisions regarding current and future grantmaking and expenditures.

Chapter 5:

Results Scorecard for Staff Management

As a part of their broader continuous improvement initiatives, an increasing number of organizations use RBA as a staff management system. Intuitively, this makes sense: efforts to improve community conditions and service delivery are catalyzed or constrained by the attitudes, behaviors, and skills of the people responsible for implementing them. Not surprisingly, high capacity, results-oriented teams and staff are more likely to “turn curves” and positively impact their customers.

The Scorecard allows you to manage the people who report to you without having to do their work. Moreover, it allows you to remain aware of what is going on in your agency without being stuck in the details. Likewise, having staff share succinct program and turn the curve reports allows you to stay informed. The Scorecard benefits both micro- and macro- managers. Ultimately, the Scorecard for staff management allows managers to trade accountability for flexibility.

Organizations that currently or intend to use RBA for staff management should be aware that the interactive Scorecard offers important functionality that can help them set goals, define performance measures, align improvement strategies, outline action plans, and track progress for team-, project-, and individual staff performance goals. Having these tools and strategies allows managers and their team to be accountable, transparent, and effective in their efforts to positively impact their customers.

Examples of how RBA and the Scorecard can be used to manage teams, individuals, and projects are presented on the next few pages.


Example 1: Staff Management for Teams

Program Presentation

CF: Development Team will raise \$120,000 by Quarter Four Print


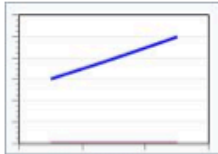

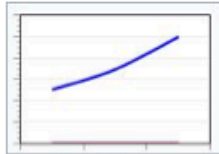


What We Do | Who We Serve | How We Impact Edit

Our team works to acquire key supporters to make and stick to personal fundraising commitments.



Performance Measures

Select

 CF: # of donations requested  <p>Q4 2011 50</p> <p>Story Behind the Curve</p> <p>3 ✕</p>	 CF: % of meetings secured to further discuss possible donation  <p>Q4 2011 50%</p> <p>Story Behind the Curve</p> <p>3 ✕</p>	 CF: Dollar amount received  <p>H2 2011 \$120,000</p> <p>Story Behind the Curve</p> <p>1 ✕</p>
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Maximizing the Results Scorecard - Results Leadership Group ©2012

Example 2: Staff Management for Teams and Individuals

Home Start Again | Scoreboard Data Driven Decisions | Reports Data & Projects | Scorecard Builder Organize Data | Administration Users, Data Import, Set up

Communities First: Staff Management First Scorecard Edit Mode Make Default Print to PDF Embed

Expand All | Collapse All | Scorecards: Communities First: Staff Management First Scorecard

Program Performance

Name	Prior Period	Current Value	Change	Most Recent Period	Comments/Projects
CF: Development Team will raise \$120,000 by Quarter Four					
CF: # of donations requested	40	50	↑ 3	Q4 2011	
CF: % of meetings secured to further discuss possible donation	35%	50%	↑ 3	Q4 2011	
CF: Dollar amount received	\$82,000	\$120,000	↑ 1	H2 2011	
CF: John Jameson's Performance Plan					
CF: How well: % invoices processed in a timely manner	65%	70%	↑ 11	Dec 2011	
CF: Better off: # of monthly budget reports complete on time	5	4	↓ 2	Dec 2011	
CF: Keisha Vance's Performance Plan					
CF: How much: # of grantees managed	25	25	→ 3	Q4 2011	
CF: How much: Average # of interactions with grantees	16	18	↑ 3	Q4 2011	
CF: How well: % of grantees submitting progress reports on time	85%	90%	↑ 3	Q4 2011	
CF: Better off: % of grantees with performance measures trending in the right direction a.k.a. turning curves	85%	90%	↑ 3	Q4 2011	

Example 3: Managing Projects

Below is an example of how a Scorecard can be set up with projects to track customer satisfaction. This helps promote accountability for implementation of actions committed to by staff.

CF: Client Satisfaction					
CF: How much: # of clients surveyed	25	20	↓	2	Q4 2011
CF: How well: % of clients that were treated well	90%	95%	↑	3	Q4 2011
CF: Better off: % of clients that had their problem solved	98%	100%	↑	3	Q4 2011

Project related to this particular measure.

Project Presentation View ✕

Related Projects

CF: Client satisfaction project

Project Comments
 Edit Project Status
 Edit
 Print

Prefix	Start Date	End Date	Assigned To	Assigned By
CF	06/23/2011	12/23/2011	Marc Stone	JaNay Queen
Parent Project	Percent Complete	Color	Description	
	0	Light Blue	Survey clients to assess their satisfaction with products and services	
Name	Status	Status Update		
Client satisfaction project	On-Track			

Example 4: Performance Feedback & Reporting

The Scorecard's interactive Turn the Curve feature allows managers and staff to review performances and adjust improvement plans using RBA's Turn the Curve Thinking. This process is oriented around 4 primary questions:

- **Story Behind the Curve** → What are the contributing & restricting factors?
- **Partners** → Who are the partners with a role to play?
- **What Works** → What does it take to do better?
- **Action Plan** → What do we propose to do?

An example of the Result Scorecard's Turn the Curve functionality is presented below:

Turning the Curve ✕

CF: John Jameson's Performance Plan
Display Settings ▾
Apply

CF: How well: % invoices processed in a timely manner
Edit
Print

Time Period	Actual Value
Dec 2011	70%
Nov 2011	65%
Oct 2011	60%
Sep 2011	55%
Aug 2011	50%
Jul 2011	45%
Jun 2011	40%
May 2011	35%
Apr 2011	30%

Story Behind The Curve Edit

- Invoices stack up when weighed against other tasks and requests that are always presented as urgent and not in advance
- Staff submit hours at the last minute
- Manual tracking systems take more time

Partners Edit

- Colleagues
- Banking Institution (for sharing best practices and tools)
- Manager - set the tone of expectation for staff submitting information for invoices to be processed

What Works Edit

- Set deadlines for receiving invoice information from staff
- Create an auto generated email that goes out weekly to remind staff to submit invoice information
- Process invoices as they come in vs. once at the end of the month

Action Plan Edit

- Create awareness among staff about the importance of receiving invoice information in a timely manner
- Schedule time in calendar to just work on invoices
- Request that supervisor manage his requests and expectations as to minimize interruption of work and invoice processing

Projects Actions ▾

Name	Status	% Complete	Assigned To	Due Date	Actions ▾
CF: Look into automated invoice processing systems	Ahead of Schedule	85%	Dave Hirsch	07/21/2011	Actions ▾

Comments Edit

Related Programs Select

Prefix	Name	Description