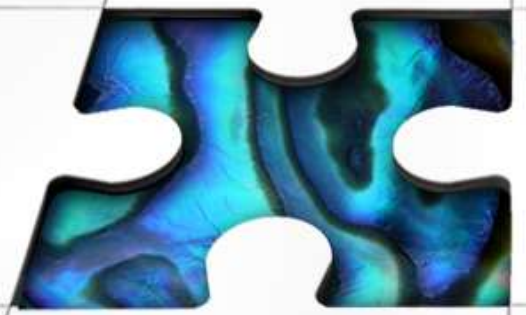


Working together to improve outcomes for clients and communities:
a practical overview and Q&A about

RBA and Data

Community Research Webinar

15 August 2017

Sharon Shea, Shea Pita and Associates, www.sheapita.co.nz

Sharon: cell - 021 482199, email - sharon@sheapita.co.nz;

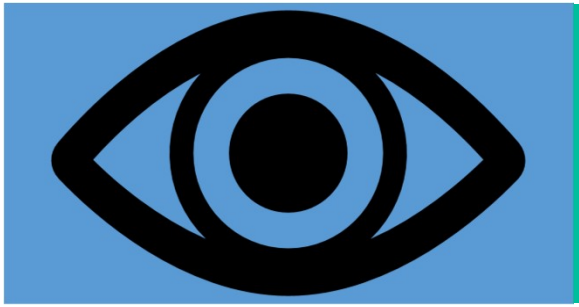
Shea Pita & Associates


Forget the
mistake.
Remember
the lesson.
@lisamessenger

HOT TOPICS

Data definitions
Data tools
Reporting
Use (7 Questions)

Part 1: Design, Collect, Use



Part 2: An NGO View

Te Runanga o Te Rarawa
Guest Speakers: Naomi & Paulette

Planning
Change management
RBA and your organisation's existing outcomes framework
RBA and Social Investment

Part 3: Strategic Uses

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Learn about key RBA concepts

2 key types of accountability and language discipline:

- Population accountability - results / outcomes and indicators
  - "the forest"
- Performance accountability - performance measures
  - "the trees"

3 types of performance measures:

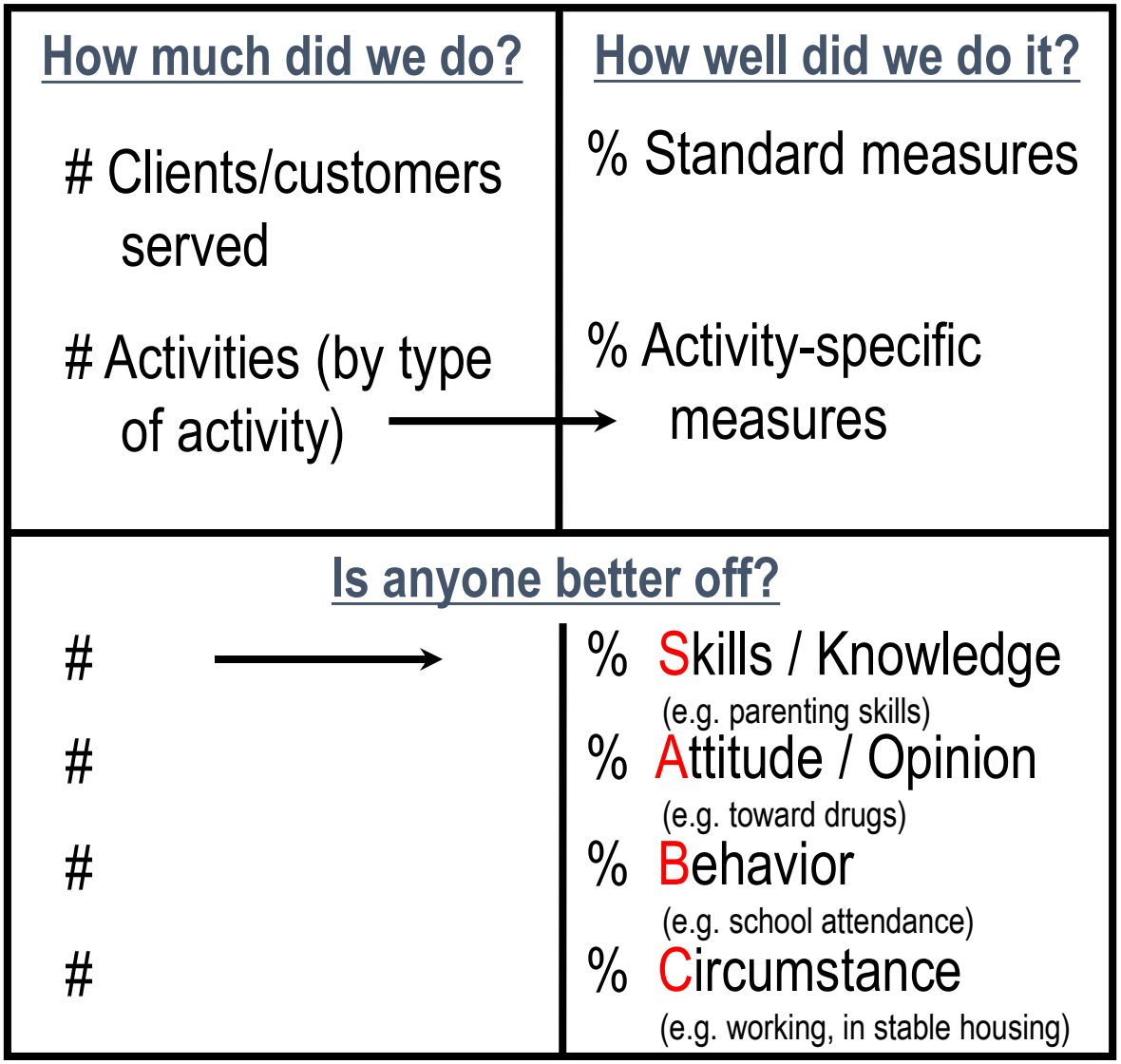
- How much did we do? (QUANTITY OF INPUTS/OUTPUTS)
- How well did we do it? (QUALITY OF DELIVERY EFFORT)
- Is anyone better off? (CLIENT OUTCOMES)

7 questions from ends to means:

- **baselines and turning the curve – to make life better for our families / whānau, children / tamariki, and communities.**

Types of performance measures found in each quadrant

Your new "best mate" slide



Standard measures e.g. client staff ratio, workload ratio, staff, turnover rate, staff morale, % staff fully trained, % clients seen in their own language, worker safety, unit cost, % client satisfaction

Activity-specific measures e.g. % timely, % clients completing activity, % correct and complete, % meeting standard

Type of Data Codes:
Subjective vs. Objective

Better Off Codes:
SK = Skills & Knowledge Change
AO = Attitude & Opinion Change
BC = Behaviour Change
CC = Circumstance Change

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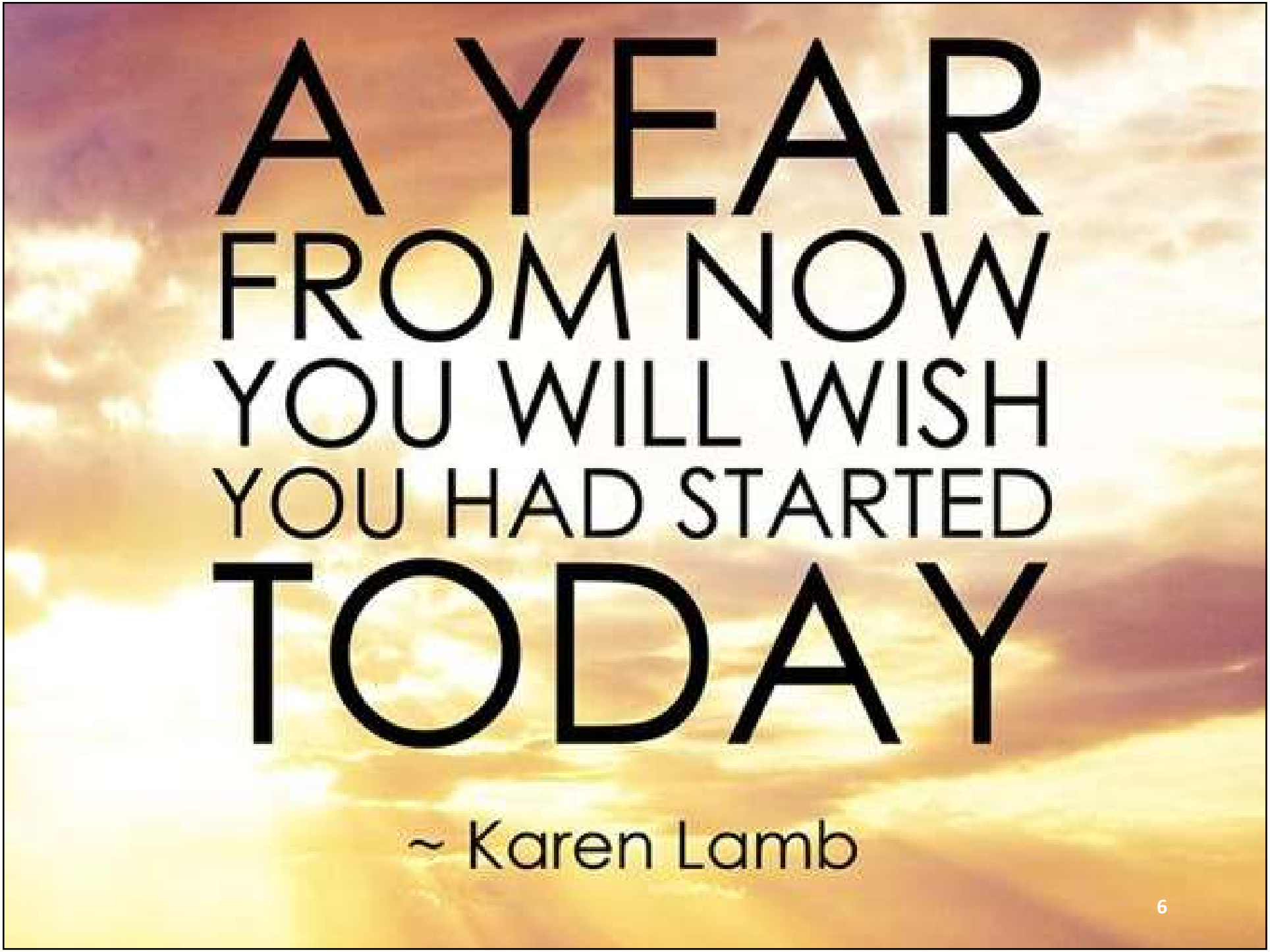
A YEAR
FROM NOW
YOU WILL WISH
YOU HAD STARTED
TODAY
~ Karen Lamb

Definitions: selected issues

- Who (client: person, people or setting)
- Indicator or performance measure
- How much, how well or better off
- Subjective or objective (good mix)
- Cumulative or per reporting period
- Benchmarking
- Shift vs. Point in time
- Meaning of words or phrases
- Unit of measure

Meaning

- **#/% clients who report they had enough money**
- **#/% whanau who achieved NCEA Level 1**

Unit of measure

- **# clients who attended their GP appointment**
- **# GP appointments attended by clients**

Data tools: selected issues

Subjective

- [ ] Survey
- [ ] Focus groups/hui/fono
- [ ] Interviews/case management
- [ ] Other?

Objective

- [ ] Observation (triangulated)
- [ ] Test
- [ ] Event
- [ ] Other?

Tips for Tools

- **Align measures with questions**
- **Likert scales vs. point in time**
  - E.g. Rate your health status (1 = poor … 10 = excellent)
  - E.g. % clients who report their health status is very good or excellent
- **Simplify**
  - Case management/engagement vs. survey
- **Quality, quality, quality**
  - Reach
  - Ethics

Every time
you present
your programme,

Use a
two-part
approach.

Population Accountability

Outcome: to which you contribute to most directly.

Indicators:

Story:

Partners:

What would it take?:

Your Role: as part of a larger strategy.

Performance Accountability

Programme:

Performance measures:

Story:

Partners:

Action plan to get better:

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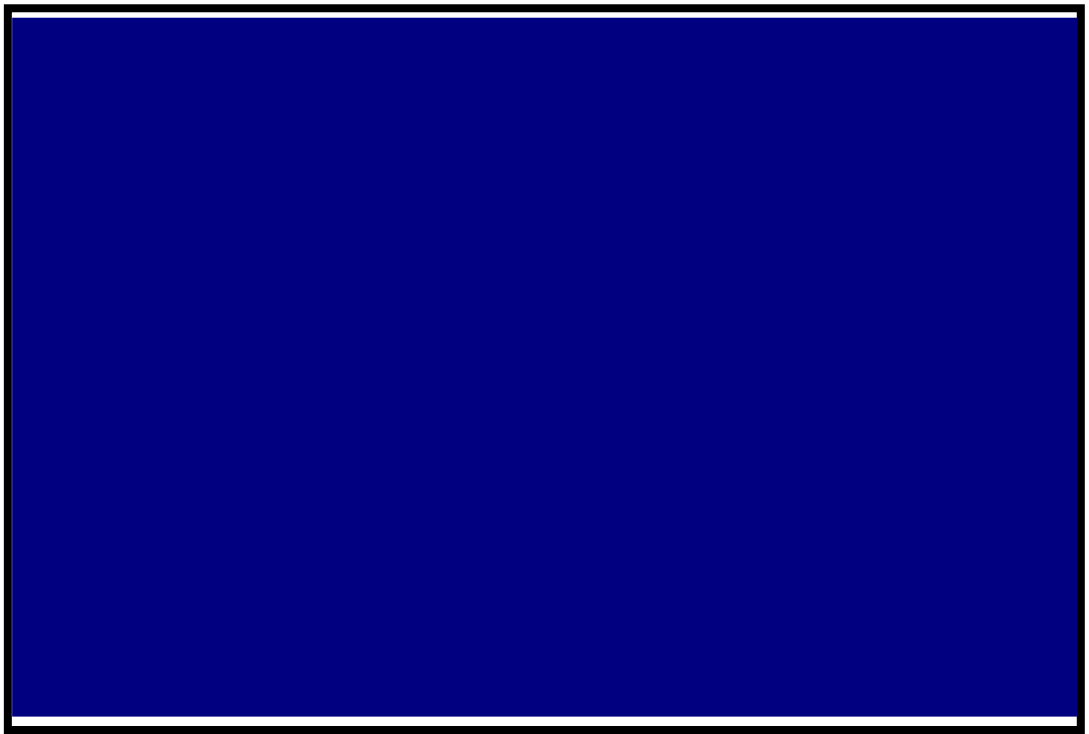
Every time
you present
your programme,

Use a
two-part
approach.



Performance Accountability

Programme:

Performance measures:

Story:

Partners:

Action plan to get better:

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& Associates

Every time you present your programme,

Use a two-part approach.

Population Accountability

Outcome: to which you contribute to most directly.

Shortcut

Performance Accountability

Programme:

Performance measures:

Story:

Partners:

Action plan to get better:

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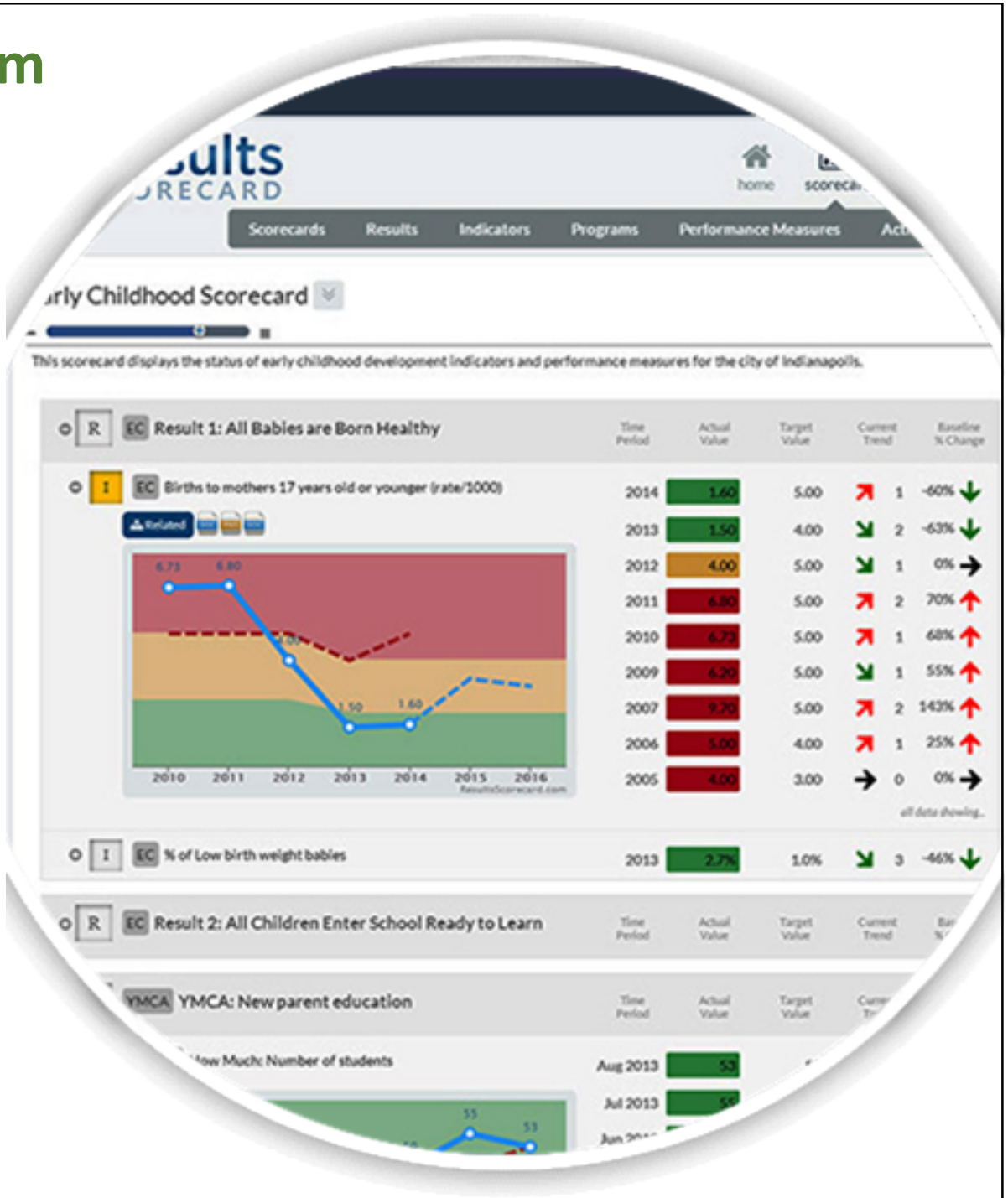
www.clearimpact.com

Clear Impact Software

- Create real-time, interactive scorecards to monitor population results and indicators, and the performance of programs and services like you have never seen before;
- Share templates globally;
- E-report;
- Share scorecards for multi-partner accountability;
- Much more …..



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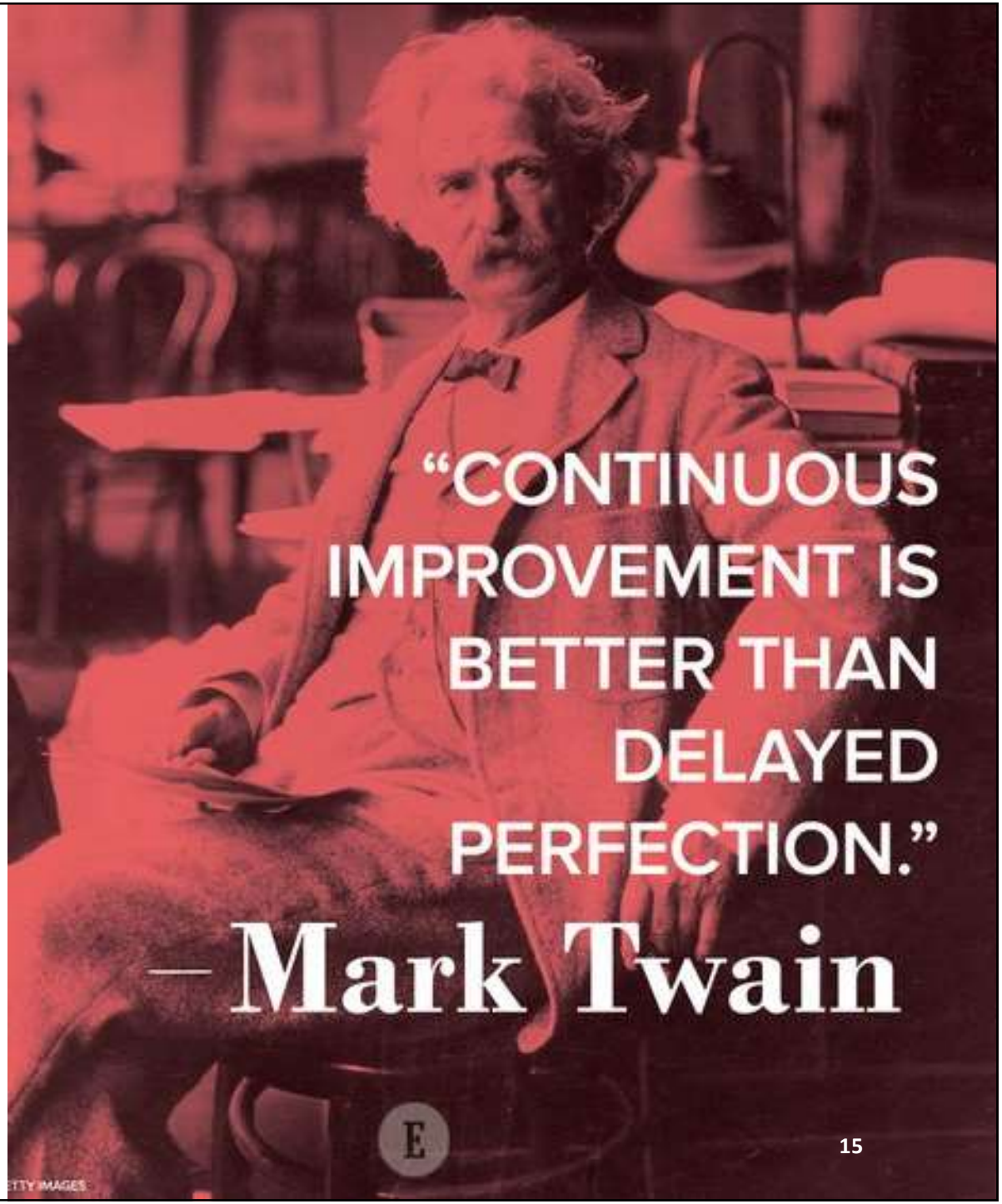

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Use: Applying the 7 Questions
(Turn the curve thinking)

Data definitions
Data tools
Reporting
Use (7 Questions)

Part 1:
Design,
Collect, Use

PERFORMANCE ACCOUNTABILITY

1. **Who are our clients? (Client Group/Customers)**
2. **How can we measure if our clients are better off? (Client Outcomes)**
3. **How can we measure if we are delivering services well? (Quality Measures)**
4. **How are we doing on the most important of these measures? (Baseline Data and Story)**
5. **Who are the partners that have a role to play in doing better? (Partners)**
6. **What works to do better including no-cost and low cost ideas? (Common sense ideas & research where available)**
7. **What do we propose to do? (Action Plan)**

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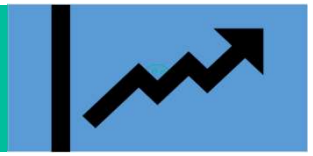
Use: RBA informs your strategic and business plans



Population Accountability = Strategic Plan

Performance Accountability = Business or Team Plans

Population Outcomes	Experience	Indicators	Strategies	Programmes, Services, Initiatives	Performance Measures
Te Ohanga: economically secure	Have long-term and stable jobs	Employment rate	Employment brokering partnerships and services	Employment Readiness Programme	HM: # clients HW: % client satisfaction BOFF: #/% clients who have drafted a CV (SK, O) BOFF: #/% clients who have interviewed for a job (BC, O)

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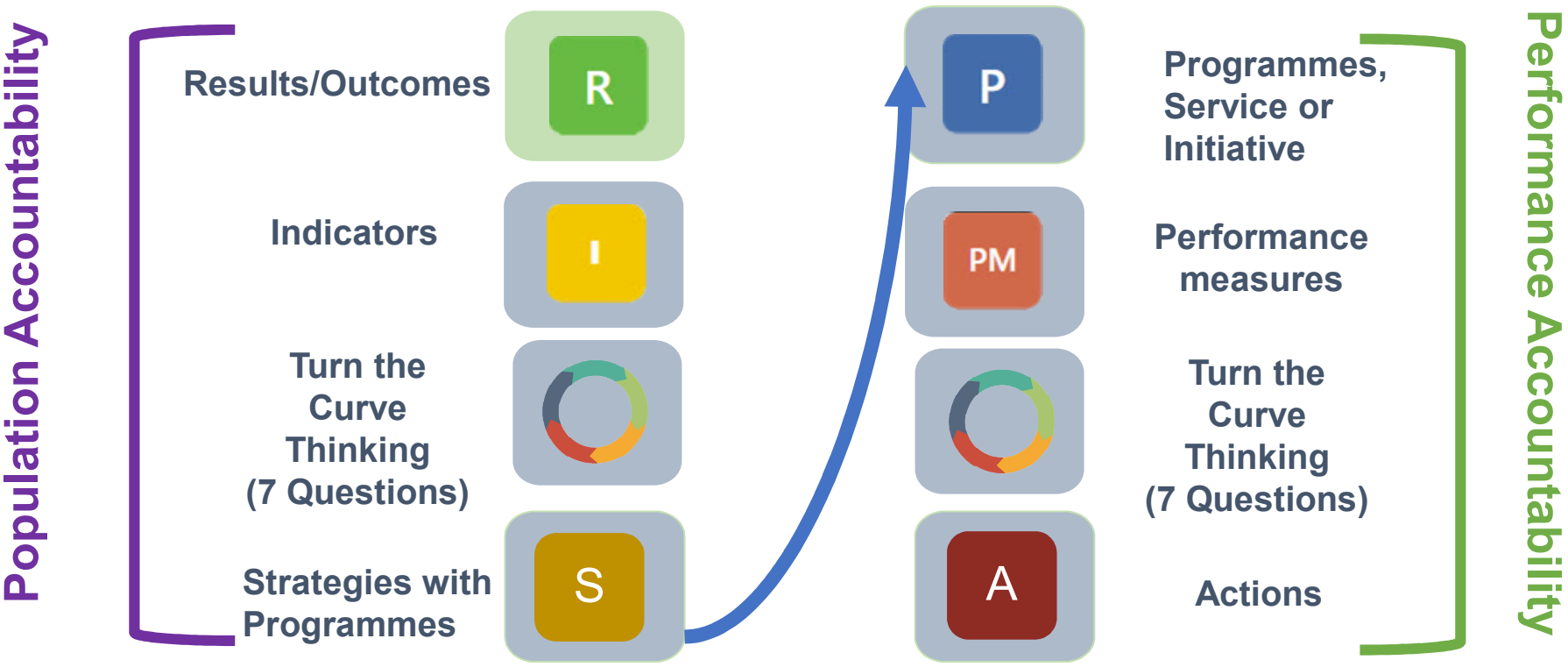
Use: RBA informs your strategies and choice of programmes/services when planning



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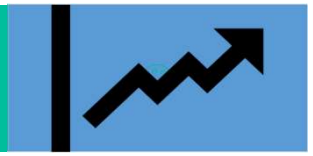
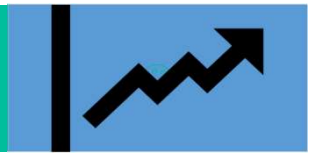


Change Management

- A sense of urgency
- *Hearts & minds*
- Communication
- *Resistance*

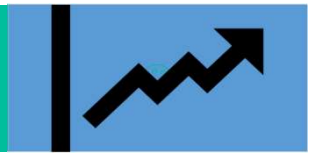
RBA

- Indicators & performance measures
  Turn the curve
- *Population outcomes*
  Better off measures
- Common language
  Turn the curve
- *All of the above*
  Visualisation
  Showcase success / continuous improvement



Existing frameworks

- **Don't have to be mutually exclusive**
- **'Map & Gap'**
- **Use existing data first**
- **Easy to use data generated from your own/other frameworks, e.g.**
  - PCOMs – outcomes rating scale and session rating scale = better off data
  - Logic model – short term outcomes = better off data
- **Fidelity**



Social Investment

- Use **data** smarter: understand current and future needs
- *Systematically measure the **effectiveness of services***
- Measure **long-term outcomes** (over a lifetime) and **feed** into decision-making
- *Understand the **fiscal implications;** help manage the long-term costs to government*

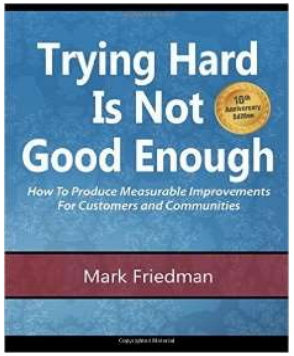
RBA

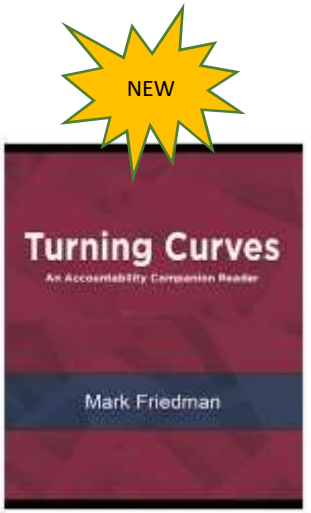
- Indicators & performance measures
  Turn the curve thinking
- *Is anyone better off?*
- Indicators
  System-level performance measures
  Is anyone better off?
- *Input into value for money formula*


THE THINGS YOU ARE
PASSIONATE ABOUT
ARE NOT RANDOM,
THEY ARE YOUR CALLING.
-- FABIENNE FREDRICKSON


Ehara taku toa
i te toa takitahi,
engari he toa takatini
Combined efforts of many are needed to complete a project
Waitangi Celebrations 1940

Results Based Accountability™





The Fiscal Policy Studies Institute

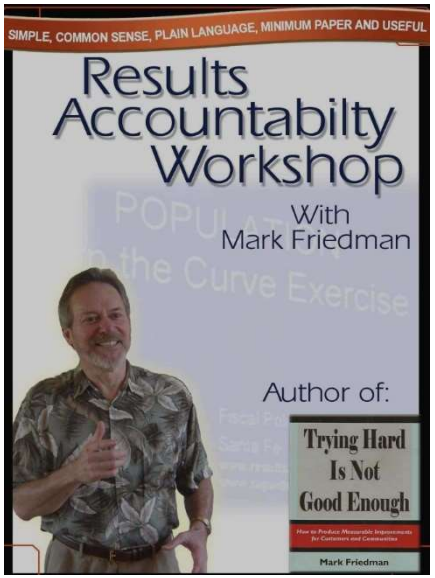
Santa Fe, New Mexico

Websites

raguide.org
resultsaccountability.com

Book - DVD Orders

sheapita.co.nz
amazon.com
resultsleadership.org



New book: **Turning Curves: An Accountability Companion Reader**
80 essays on new updates about RBA

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Acknowledgements

- **Mark Friedman**, The Fiscal Policy Studies Institute Santa Fe, New Mexico, author of Results Based Accountability, www.resultsaccountability.com
- Pinterest
- Te Runanga o Te Rarawa
- Social Investment Agency, Wellington
- Clearimpact.com
- http://www.thetereomaoriclassroom.co.nz/2017/02/te-waka-symbol-of-collaboration.html

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