PERFORM TEMPLATES

PERFORM: The Performance Mapping and Improvement System

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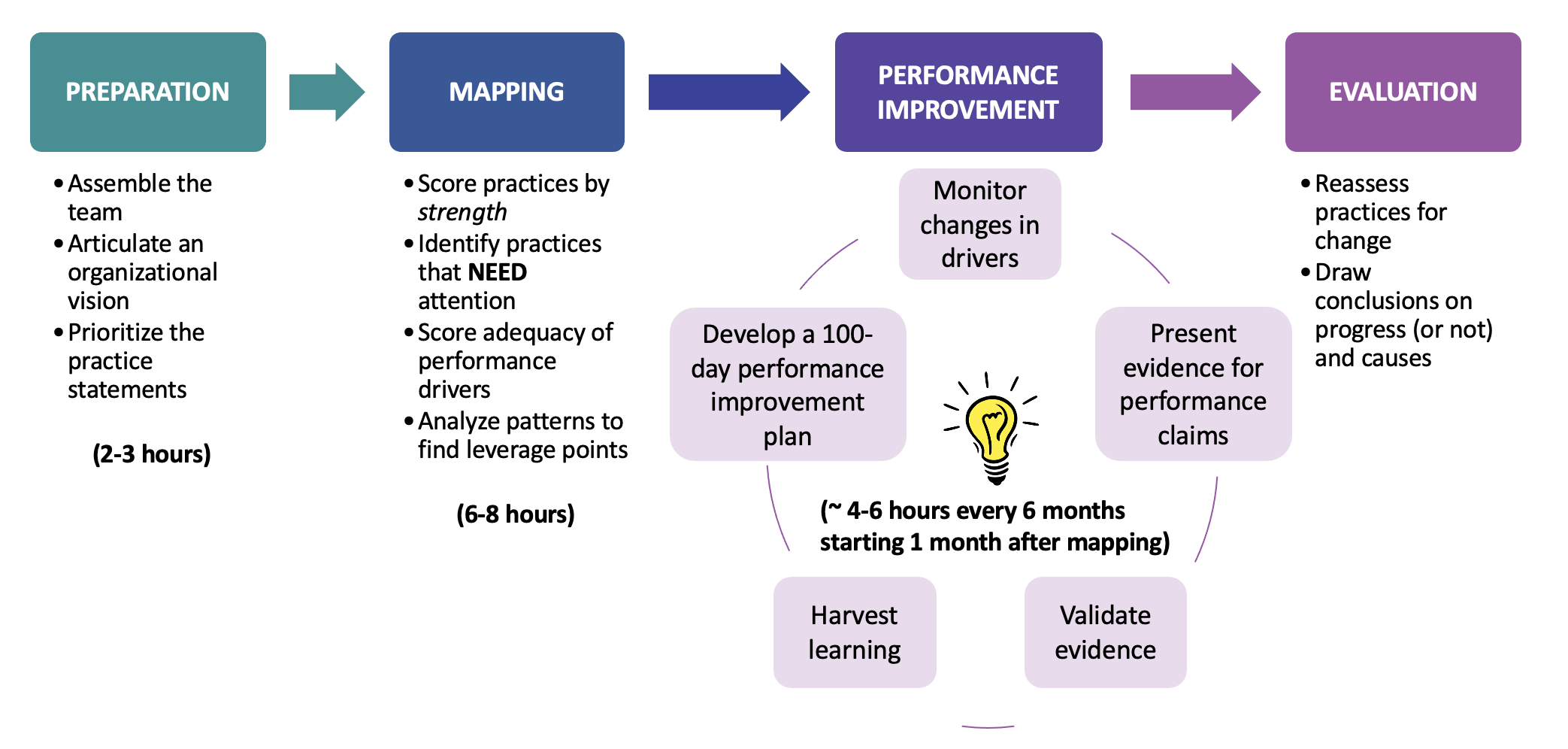
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# The PERFORM Road Map



# Relevant Terms

**Behaviors**  Organizational practices that demonstrate established knowledge, skills, and values.

**Capacity** The attributes that enable an organization to perform and add value to those it serves in conditions of high complexity.

**Capacity domains** Five key capacities that work together to create the conditions necessary to achieve an organization’s performance improvement goal(s).

**Driver Rating** Analyzing and monitoring changes in the performance drivers help PERFORM users manage the organizational improvement process more efficiently and pinpoint where resources should be directed. Drivers are rated as being *fully adequate to support strong performance, partially adequate to support strong performance, or inadequate to support strong performance.*

**Organizational performance** The joint effectiveness of processes, functions, and activities that creates the conditions necessary to achieve development results.

**Performance** The adequacy of behaviors and processes—individual and joint—to achieve an intended result.

**Performance drivers** Performance drivers shed light on the “whys” of organizational performance in each area of practice. For PERFORM, the performance drivers are knowledge or skills, resources, external relationships, supportive leadership, and norms or culture.

**Performance goal** This is the high-order change needed to achieve an organization’s mission or service delivery goals. The capacity map is created in relation to this goal or goals.

**Performance improvement** Changes in an organization’s behaviors or practices that enable it to work with greater efficiency or effectiveness.

**Performance rating** In a capacity mapping, each statement is rated according to the extent to which the organization demonstrates the practice and meets the criteria in the statement, i.e., as a *strength* accurately describe us, *asset* somewhat describe us, and *challenge* does not describe us.

**Practice statements** Observable organizational processes, functions, and activities that illustrate the capacity domains. Practices are written in the form of behavior statements that demonstrate critical knowledge, skills, and/or values. Practice statements include qualifiers that establish clear criteria for the performance of the practice. An example would be “*Regularly communicates with stakeholders about organizational achievements and challenges.”*

**Priority rating** Each practice is rated on a three-point scale describing the level of importance (priority) it holds for achieving the performance goal. The priorities are rated as high (critical to success at this time), medium (important but not critical), and low (not important).

**Urgency index** A rating that is used to sort the mapping results for each practice according to its performance and priority rating. This index is calculated automatically in the [PERFORM Microsoft Excel data template](https://usaidmomentum.org/resource/perform).

# PERFORM Framework

|  |  |
| --- | --- |
| Performance Domain | Practice Statements |
| **Fosters Self-Determination** | * *Regularly* communicates a transformative vision of an ideal future *to diverse stakeholder groups.* * *Routinely* takes initiative to mobilize resources as new community needs emerge. * *Routinely* sets aside times for staff, volunteers, and stakeholders to reflect on values and practices. * Consistently *takes steps* that build leadership capacity all staff levels. * *Periodically* identifies strengths and growth areas as part of an ongoing, self-directed process of capacity development. |
| **Produces Sustainable Results** | * *Consistently* offers services that reflect user needs and preferences. * Routinely works with stakeholders to create a strategy for sustaining results when external support ends. * *Periodically* assesses current practices against quality standards. * *Regularly* works with local communities to build upon their assets and ideas. * *Consistently* promotes solutions that address root causes for development challenges. |
| **Aligns Systems for Agility** | * *Routinely* tasks cross-functional teams to meet objectives. * Consistently *takes steps to recruit staff members from the local community.* * *Consistently* manages finances so that *stakeholders* receive timely, useful, and accurate information. * Secures *sufficient* support from different sources to ensure that funding streams are diversified. * Maintains reserve funds to cover at least two months of operational activity. |
| **Learns and Adapts** | * *Routinely* solicits and uses stakeholder feedback to expand impact. * *Regularly* scans for trends relevant to organizational mission and services. * Regularly uses data to monitor project performance. * Meets *regularly* to learn lessons from project successes and failures. * *Routinely* fosters innovations by testing out new ideas. |
| **Attracts and Sustains Support** | * *Regularly* communicates with *stakeholders* about organizational achievements and challenges. * Provides stakeholders, *on an ongoing basis,* with *meaningful* opportunities to contribute to the organization’s work. * *Actively* participates in multi-stakeholder networks. * *Frequently* sharesuseful information and valuable resources with peer organizations. * *Frequently* takes joint action with *cross-sectoral actors* to address issues of common concern. |

# Preparation Phase

#### Description of Organizational Vision

|  |
| --- |
| Organizational Vision:Describe the vision of the organization in future, operating at its ideal level of performance within a chosen time frame (3 years, 5 years, or end of a specific organization strengthening project.) |
| Description of Current Situation: (including organizational strengths and challenges) |
| Organizational Interests (MILESTONES):  (Specify 1–3 accomplishments that will demonstrate successful achievement of the organizational vision, such as meeting specific quality standards, expanded client reach, increased donor base, NUPAS certification, etc.) |

**Note:** This step in the PERFORM can contribute toward CBLD-9 monitoring in that it provides: a) an intentional and documented a process of performance improvement; and b) key performance metrics by which to demonstrate improvement

## PERFORM Team Role Descriptions

The following are general descriptions of the PERFORM teams and their composition to help the organization select the right people to engage in the process.

### PERFORM Leadership Team

The Leadership Team oversees the PERFORM process to ensure it contributes to organizational goals. Illustrative members include the Executive Director, heads of departments, optionally board members. Receives periodic progress reports from the Core Team.

Ideal size = 3–5 people.

|  |  |  |
| --- | --- | --- |
| Name | Position  (Board, Staff, Volunteer) | Level of affiliation  (Field Office, Headquarters, Other) |
|  |  |  |
|  |  |  |
|  |  |  |

### PERFORM Core Team Members

The Core Team is the primary group doing the ongoing performance mapping and improvement monitoring. Typical members include representatives from both senior and junior staff across all departments. Note: it is recommended that the organization’s Executive Director (or equivalent) *not* serve on this team.

Specific roles within the team include members who can act as a) *Facilitator* (someone able to provide objective facilitation to the team) and b) *Data Manager* (someone on the team able to organize and coordinate data files). **Note:** while external facilitation is not necessary, someone with deeper knowledge of the PERFORM process is valuable, particularly for the initial mapping and monitoring cycle.

Ideal size = 5–8 people.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Position  (Board, Staff, Volunteer) | Level of affiliation  (Field Office, Headquarters, Other) | Role on Team  (Facilitator, Data Manager, Reporter, Other) |
|  |  |  |  |
|  |  |  |  |
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### 

### PERFORM Evidence Validation Panel Members

The Evidence Validation Panelvalidates evidence of performance improvement collected by the Core Team. Illustrative members include board members, community stakeholders, even senior organizational staff not on either of the other two teams. Representatives from donors or implementing partner organizations may be included, but this is not encouraged.

Ideal size = 3–4 people.

|  |  |  |
| --- | --- | --- |
| Name | Position  (Board, Staff, Volunteer) | Level of affiliation  (Field Office, Headquarters, Other) |
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## Customizing PERFORM

Use the following template to record agreements on how to adapt PERFORM to be of most value to the organization.

|  |  |
| --- | --- |
| Customization Choices | Decision |
| **Who will receive the mapping findings and monitoring updates?** | (*Check all that apply*)  Internal staff  Board / governing body  Peer organizations  Community members  Implementing or sponsoring partner  Current or potential funders |
| **Over how many sessions will the mapping be done?** | (*Fill in the blanks*)  # Sessions per day: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  # Hours per session: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  # Days duration: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **How frequently will the 100-day plan be monitored?** | (*Check one*)  Quarterly (4x/year)  Semi-annually (2x/year)  Other: \_\_\_ number of weeks/months |

# Mapping Phase

## Mapping Worksheet

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Performance Domain | Practice Statements | | | Priority Rating | Performance Rating | | Urgency Index | Performance Drivers | | | | | |
| Res | | Rel | SL | K/S | N/C |
| **Fosters Self-Determination** | 1. *Regularly* communicates a transformative vision of an ideal future *to diverse stakeholder groups* | | |  |  | |  |  | |  |  |  |  |
| 1. *Routinely* takes initiative to mobilize resources as new community needs emerge | | |  |  | |  |  | |  |  |  |  |
| 1. *Routinely* sets aside times for staff, volunteers, and stakeholders to reflect on values and practices | | |  |  | |  |  | |  |  |  |  |
| 1. Consistently *takes steps* that build leadership capacity at all staff levels | | |  |  | |  |  | |  |  |  |  |
| 1. *Periodically* identifies strengths and growth areas as part of an ongoing, self-directed process of capacity development | | |  |  | |  |  | |  |  |  |  |
| **Key Terms** | | | | | | | | | | | | | |
| **Priority Rating** | | **Performance Rating** | **Urgency Index** | | | **Performance Drivers** | | | **Driver Rating** | | | | |
| **High**: Critical to success *at this time*  **Medium**: Important but not critical *at this time*  **Low**: Not important *at this time* | | **Strength**: This statement very accurately describes us  **Asset**: This statement somewhat accurately describes us  **Challenge**: This statement is far removed from what we do | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | *Priority Rating* | High | | **URGENT** | **URGENT** | **OPTIONAL** | | | Med | | **URGENT** | **OPTIONAL** | **NOT NEEDED NOW** | | | Low | | **OPTIONAL** | **NOT NEEDED NOW** | **NOT NEEDED NOW** | | |  | | Challenge | Asset | Strength | | |  |  | *Performance Rating* | | | | | | | Res: Resources  Rel: External relationships  SL: Supportive leadership  K/S: Knowledge or skills  N/C: Norms or culture | | | Driver is:  3*: Fully adequate to support strong performance*  *2: Partially adequate to support strong performance*  *1: Inadequate to support strong performance* | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Capacity Domain | Practice Statements | | | Priority Rating | Performance Rating | | Urgency Index | Performance Drivers | | | | | |
| Res | | Rel | SL | K/S | N/C |
| **Produces Sustainable Results** | 1. *Consistently* offers services that reflect user needs and preferences | | |  |  | |  |  | |  |  |  |  |
| 1. Routinely works with stakeholders to create a strategy for sustaining results when external support ends | | |  |  | |  |  | |  |  |  |  |
| 1. *Periodically* assesses current practices against quality standards | | |  |  | |  |  | |  |  |  |  |
| 1. *Regularly* works with local communities to build upon their assets and ideas | | |  |  | |  |  | |  |  |  |  |
| 1. *Consistently* promotes solutions that address root causes to development challenges | | |  |  | |  |  | |  |  |  |  |
| **Key Terms** | | | | | | | | | | | | | |
| **Priority Rating** | | **Performance Rating** | **Urgency Index** | | | **Performance Drivers** | | | **Driver Rating** | | | | |
| **High**: Critical to success *at this time*  **Medium**: Important but not critical *at this time*  **Low**: Not important *at this time* | | **Strength**: This statement very accurately describes us  **Asset**: This statement somewhat accurately describes us  **Challenge**: This statement is far removed from what we do | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | *Priority Rating* | High | | **URGENT** | **URGENT** | **OPTIONAL** | | | Med | | **URGENT** | **OPTIONAL** | **NOT NEEDED NOW** | | | Low | | **OPTIONAL** | **NOT NEEDED NOW** | **NOT NEEDED NOW** | | |  | | Challenge | Asset | Strength | | |  |  | *Performance Rating* | | | | | | | Res: Resources  Rel: External relationships  SL: Supportive leadership  K/S: Knowledge or skills  N/C: Norms or culture | | | Driver is:  3*: Fully adequate to support strong performance*  *2: Partially adequate to support strong performance*  *1: Inadequate to support strong performance* | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Capacity Domain | Practice Statements | | | Priority Rating | Performance Rating | | Urgency Index | Performance Drivers | | | | | |
| Res | | Rel | SL | K/S | N/C |
| **Aligns Systems for Agility** | 1. *Routinely* tasks cross-functional teams to meet objectives | | |  |  | |  |  | |  |  |  |  |
| 1. Consistently *takes steps to recruit staff members from the local community* | | |  |  | |  |  | |  |  |  |  |
| 1. *Consistently* manages finances so that *stakeholders* receive timely, useful, and accurate information | | |  |  | |  |  | |  |  |  |  |
| 1. Secures *sufficient* support from different sources to ensure that funding streams are diversified | | |  |  | |  |  | |  |  |  |  |
| 1. Maintains reserve funds to cover at least two months of operational activity | | |  |  | |  |  | |  |  |  |  |
| **Key Terms** | | | | | | | | | | | | | |
| **Priority Rating** | | **Performance Rating** | **Urgency Index** | | | **Performance Drivers** | | | **Driver Rating** | | | | |
| **High**: Critical to success *at this time*  **Medium**: Important but not critical *at this time*  **Low**: Not important *at this time* | | **Strength**: This statement very accurately describes us  **Asset**: This statement somewhat accurately describes us  **Challenge**: This statement is far removed from what we do | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | *Priority Rating* | High | | **URGENT** | **URGENT** | **OPTIONAL** | | | Med | | **URGENT** | **OPTIONAL** | **NOT NEEDED NOW** | | | Low | | **OPTIONAL** | **NOT NEEDED NOW** | **NOT NEEDED NOW** | | |  | | Challenge | Asset | Strength | | |  |  | *Performance Rating* | | | | | | | Res: Resources  Rel: External relationships  SL: Supportive leadership  K/S: Knowledge or skills  N/C: Norms or culture | | | Driver is:  3*: Fully adequate to support strong performance*  *2: Partially adequate to support strong performance*  *1: Inadequate to support strong performance* | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Capacity Domain | Practice Statements | | | Priority Rating | Performance Rating | | Urgency Index | Performance Drivers | | | | | |
| Res | | Rel | SL | K/S | N/C |
| **Learns and Adapts** | 1. *Routinely* solicits and uses stakeholder feedback to expand impact | | |  |  | |  |  | |  |  |  |  |
| 1. *Regularly* scans for trends relevant to organizational mission and services | | |  |  | |  |  | |  |  |  |  |
| 1. Regularly uses data to monitor project performance | | |  |  | |  |  | |  |  |  |  |
| 1. Meets *regularly* to learn lessons from project successes and failures | | |  |  | |  |  | |  |  |  |  |
| 1. *Routinely* fosters innovations by testing out new ideas | | |  |  | |  |  | |  |  |  |  |
| **Key Terms** | | | | | | | | | | | | | |
| **Priority Rating** | | **Performance Rating** | **Urgency Index** | | | **Performance Drivers** | | | **Driver Rating** | | | | |
| **High**: Critical to success *at this time*  **Medium**: Important but not critical *at this time*  **Low**: Not important *at this time* | | **Strength**: This statement very accurately describes us  **Asset**: This statement somewhat accurately describes us  **Challenge**: This statement is far removed from what we do | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | *Priority Rating* | High | | **URGENT** | **URGENT** | **OPTIONAL** | | | Med | | **URGENT** | **OPTIONAL** | **NOT NEEDED NOW** | | | Low | | **OPTIONAL** | **NOT NEEDED NOW** | **NOT NEEDED NOW** | | |  | | Challenge | Asset | Strength | | |  |  | *Performance Rating* | | | | | | | Res: Resources  Rel: External relationships  SL: Supportive leadership  K/S: Knowledge or skills  N/C: Norms or culture | | | Driver is:  3*: Fully adequate to support strong performance*  *2: Partially adequate to support strong performance*  *1: Inadequate to support strong performance* | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Capacity Domain | Practice Statements | | | Priority Rating | Performance Rating | | Urgency Index | Performance Drivers | | | | | |
| Res | | Rel | SL | K/S | N/C |
| **Attracts and Sustains Support** | 1. *Regularly* communicates with *stakeholders* about organizational achievements and challenges | | |  |  | |  |  | |  |  |  |  |
| 1. Provides stakeholders, *on an ongoing basis,* with *meaningful* opportunities to contribute to the organization’s work | | |  |  | |  |  | |  |  |  |  |
| 1. *Actively* participates in multi-stakeholder networks | | |  |  | |  |  | |  |  |  |  |
| 1. *Frequently* sharesuseful information and valuable resources with peer organizations | | |  |  | |  |  | |  |  |  |  |
| 1. *Frequently* takes joint action with *cross-sectoral actors* to address issues of common concern | | |  |  | |  |  | |  |  |  |  |
| **Key Terms** | | | | | | | | | | | | | |
| **Priority Rating** | | **Performance Rating** | **Urgency Index** | | | **Performance Drivers** | | | **Driver Rating** | | | | |
| **High**: Critical to success *at this time*  **Medium**: Important but not critical *at this time*  **Low**: Not important *at this time* | | **Strength**: This statement very accurately describes us  **Asset**: This statement somewhat accurately describes us  **Challenge**: This statement is far removed from what we do | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | *Priority Rating* | High | | **URGENT** | **URGENT** | **OPTIONAL** | | | Med | | **URGENT** | **OPTIONAL** | **NOT NEEDED NOW** | | | Low | | **OPTIONAL** | **NOT NEEDED NOW** | **NOT NEEDED NOW** | | |  | | Challenge | Asset | Strength | | |  |  | *Performance Rating* | | | | | | | Res: Resources  Rel: External relationships  SL: Supportive leadership  K/S: Knowledge or skills  N/C: Norms or culture | | | Driver is:  3*: Fully adequate to support strong performance*  *2: Partially adequate to support strong performance*  *1: Inadequate to support strong performance* | | | | |

## Driver Scoresheet

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Capacity Domain / Practice Statement | Performance Drivers | | | | |
| Res | Rel | SL | K/S | N/C |
| **Fosters Self-Determination** | | | | | |
| * *Regularly* communicates a transformative vision of an ideal future *to diverse stakeholder groups* |  |  |  |  |  |
| * *Routinely* takes initiative to mobilize resources as new community needs emerge |  |  |  |  |  |
| * Routinely sets aside times for staff, volunteers and stakeholders to reflect on values and practices |  |  |  |  |  |
| * *Consistently* takes steps that build leadership capacity at all staff levels |  |  |  |  |  |
| * *Periodically* identifies strengths and growth areas as part of an ongoing, self-directed process of capacity development |  |  |  |  |  |
| **Produces Sustainable Results** | | | | | |
| * *Consistently* offers services that reflect user needs and preferences |  |  |  |  |  |
| * Routinely works with stakeholders to create a strategy for sustaining results when external support ends |  |  |  |  |  |
| * *Periodically* assesses current practices against quality standards |  |  |  |  |  |
| * *Regularly* works with local communities to build upon their assets and ideas |  |  |  |  |  |
| * *Consistently* promotes solutions that address root causes to development challenges |  |  |  |  |  |
| **Aligns Systems for Agility** | | | | | |
| * *Routinely* tasks cross-functional teams to meet objectives |  |  |  |  |  |
| * Consistently *takes steps to recruit staff members from the local community* |  |  |  |  |  |
| * *Consistently* manages finances so *stakeholders* receive timely, useful, accurate information |  |  |  |  |  |
| * Secures *sufficient* support from different sources to ensure that funding streams are diversified |  |  |  |  |  |
| * Maintains reserve funds to cover at least two months of operational activity |  |  |  |  |  |
| **Learns and Adapts** | | | | | |
| * *Routinely* solicits and uses stakeholder feedback to expand impact |  |  |  |  |  |
| * *Regularly* scans for trends relevant to organizational mission and services |  |  |  |  |  |
| * Regularly uses data to monitor project performance |  |  |  |  |  |
| * Meets *regularly* to learn lessons from project successes and failures |  |  |  |  |  |
| * *Routinely* fosters innovations by testing out new ideas |  |  |  |  |  |
| **Attracts and Sustains Support** | | | | | |
| * *Regularly* communicates with *stakeholders* about organizational achievements and challenges |  |  |  |  |  |
| * Provides stakeholders, *on an ongoing basis,* with *meaningful* opportunities to contribute to the organization’s work |  |  |  |  |  |
| * *Actively* participates in multi-stakeholder networks |  |  |  |  |  |
| * *Frequently* sharesuseful information and valuable resources with peer organizations |  |  |  |  |  |
| * *Frequently* takes joint action with *cross-sectoral actors* to address issues of concern |  |  |  |  |  |

# Performance Improvement Phase

## Evidence Summary Grid

Evidence can be in the form of an activity report; manual; newsletter; curriculum; survey results; budgets; excerpts from a strategic plan; meeting minutes or agendas; evaluation findings; etc. It can also include structured observations; interviews with participants; multimedia testimonials; and the presentation of tangible results.

It is not necessary to provide a unique piece of evidence for each practice statement. Occasionally, a single item may provide evidence for several practices across multiple domains. However, each time a piece of evidence is introduced, it must be rescored in relation to the statement of practice.

Select evidence, whenever possible, that is not more than 18 months old.

Attach evidence in hard copy or electronic form to this template.

**Name of Organization:**

|  |  |  |
| --- | --- | --- |
| PERFORMANCE Domain: | FOSTERS SELF-DETERMINATION | |
| Practice Statements | Evidence Presented (by Name) to Support Ratings | Source |
|  |  |  |
|  |  |  |
|  |  |  |

*Example:*

|  |  |  |
| --- | --- | --- |
| PERFORMANCE Domain: | FOSTERS SELF-DETERMINATION | |
| Practice Statements | Evidence Presented (by Name) to Support Ratings | Source |
| A1. Routinely takes initiative to mobilize resources as new community needs emerge |  |  |
| B1. Consistently demonstrates practices that build leadership capacity all staff levels |  |  |

## Evidence Quality Review Scoresheet

Definitions:

**Relevance**: Evidence presented is directly linked to the domain and practice and is not more than 18 months old (except under special circumstances)

**Sufficiency**: The quantity and scope of the evidence presented is sufficient to draw conclusions about the degree to which the domain and dimension under consideration fulfill the criteria delineated in the rubric.

[for use by the Evidence Validation Panel]

**Name of Organization:**

**Evidence Validation Panel Members:**



**Date of Validation:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| TOTALS | *Subtotal for* ***Relevance****:* | *Subtotal for* ***Sufficiency****:* | GRAND TOTAL: | |
| *Evidence* | *Relevance Score*  (0–2) | *Sufficiency Score*  (0–2) | Evidence Score | Evidence Accepted?  (Yes/No) |
| FOSTERS SELF DETERMINATION | | | | |
| Sa1 |  |  |  |  |
| Sb1 |  |  |  |  |
| Sb2 |  |  |  |  |
| Notes: | | | | |
| PRODUCES SUSTAINABLE RESULTS | | | | |
| Pa1 |  |  |  |  |
| Pb1 |  |  |  |  |
| Notes: | | | | |
| ALIGNS SYSTEMS FOR AGILITY | | | | |
| Aa1 |  |  |  |  |
| Ab1 |  |  |  |  |
| Notes: | | | | |
| LEARNS AND ADAPTS | | | | |
| La1 |  |  |  |  |
| Lb1 |  |  |  |  |
| Notes: | | | | |
| ATTRACTS AND MAINTAINS SUPPORT | | | | |
| Ma1 |  |  |  |  |
| Mb1 |  |  |  |  |
| Notes: | | | | |

### NOTES

Scoring Scale:

* 2 = The evidence completely supports the rating assigned by internal assessment team.
* 1 = The evidence partially supports the rating assigned by internal assessment team.
* 0 = The evidence does not support the rating assigned by internal assessment team in any way.
* When no evidence is provided (in the case of “Developing” ratings), record “NE” in the grid

Note: The internal assessment team does not need to provide evidence to justify a rating of “Developing.” Evidence is only required to support ratings of “Accomplished” and “Exemplary.” Use the comments section of the scoresheet to explain ratings of “Developing.”

RESULTS CALCULATION: If the total evidence score reported in the last column is…

* 3 or 4, the internal assessment team’s rating is accepted
* 2, the internal assessment team’s rating is accepted with reservation
* 0 or 1, the rating should automatically be changed to “Developing.”

Note: A piece of evidence must score at least a 1 for relevance to be considered, regardless of how highly it scores for sufficiency.

# Progress Monitoring Template

**Name of Organization:**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Performance Domains** | **Practices** | **Performance** | | | **Drivers** | | | | | | | **Progress** | | | | |
| Strength | Asset | Challenge | Resources | External Relationships | Supportive Leadership | Knowledge / Skills | | Norms/Culture | | Exceeds Expectations | | On Track | | Obstacles Encountered |
| 1. **Fosters Self-Determination** | #1 |  |  |  |  |  |  |  | |  | |  | |  | |  |
| #2 |  |  |  |  |  |  |  | |  | |  | |  | |  |
| **COMMENTS:** | | | | | | | | | | | | | | | |
| 1. **Produces Sustainable Results** | #1 |  |  |  |  |  |  | |  | |  |  |  | |  | |
| #2 |  |  |  |  |  |  | |  | |  |  |  | |  | |
| **COMMENTS:** | | | | | | | | | | | | | | | |
| 1. **Aligns Systems for Agility** | #1 |  |  |  |  |  |  | |  | |  |  |  | |  | |
| #2 |  |  |  |  |  |  | |  | |  |  |  | |  | |
| #3 |  |  |  |  |  |  | |  | |  |  |  | |  | |
| **COMMENTS:** | | | | | | | | | | | | | | | |
| 1. **Learns and Adapts** | #1 |  |  |  |  |  |  | |  | |  |  |  | |  | |
| #2 |  |  |  |  |  |  | |  | |  |  |  | |  | |
| **COMMENTS:** | | | | | | | | | | | | | | | |
| 1. **Attracts and Sustains Support** | #1 |  |  |  |  |  |  | |  | |  |  |  | |  | |
| **COMMENTS:** | | | | | | | | | | | | | | | |

## Progress Learning

1. **What progress are we making that we expected to see?**

**What were the key contributors to that progress?**

1. **What progress are we not making that we expected to see?**

**What were the key contributors to that lack of progress?**

1. **List 3–5 important lessons learned at this point in the plan’s implementation**
2. **What corrective action is needed for milestones are not accomplished or schedule?**
3. **Needed plan revisions:**
4. **Actions we can take to generate and maintain momentum for change:**

# 100-Day Performance Improvement Plan

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **100-day Performance Improvement Plan** | | | | | | |
| Plan start date: \_\_\_\_\_\_\_\_\_\_\_ | Plan end date:\_\_\_\_\_\_\_\_\_\_\_\_\_ | | Activity manager: \_\_\_\_\_\_\_\_\_\_\_ | | | |
| Performance Goal: | | | | | | |
| Priority Practices Areas  *Top 5–7 Practice statements that are the focus of performance improvement* | |  | | | | |
| Measurable Results  *Qualitative or quantitative metrics that will provide evidence of enhanced performance* | |  | | | | |
| Performance Drivers  *Which performance drivers were identified as critical to the practice performance, either as an enabler or inhibitor?* | | Enablers | | Inhibitors | | |
| Change Strategies  *What key methods will be tried to shift or leverage the performance drivers? What is the rationale for the methods chosen?* | |  | | | | |
| Actions to be taken | | Person Responsible | | | Start | End |
|  | |  | | |  |  |
|  | |  | | |  |  |
|  | |  | | |  |  |
| Required Commitments  *What commitments or authorizations are needed from recipients, leaders, or change agents regarding time, cost, or change strategies?* | |  | | | | |