Choice Neighborhoods
Performance Measurement and Management Systems
Agenda & Speakers

• Speakers:
  – Karen Leung, HUD Office of Public Housing Investments, Choice Neighborhoods
  – Marsha Tonkovich, ICF
Agenda

• Topics to consider when selecting a system
• Characteristics of a useful performance management system
• Types of performance measurement systems
• Implementing the system
Asking Questions

• Webinar will be interactive – please ask questions throughout
  – Will also have a couple of polls

• How to ask questions
  – Verbal questions: Use “raise your hand” function to indicate that you have a question
    • Please remember to UNMUTE yourself on your phone before speaking
  – Written questions: Type questions into “Questions” box located on your GoToWebinar panel
This is the last webinar in Choice Neighborhoods webinar series on Performance Measurement

Previous webinars covered:

- Overview of Performance Measurement and Management
- Partner Contributions to Shared Outcomes
- Data Partnerships

Link to previous webinars and materials:

Poll #1

• What is your biggest data system question:
  – Cost to purchase software
  – Cost to maintain the software
  – Ease of use for staff/partners
  – Compatibility with other systems
Key Topics to Consider

• When developing a data system, consider:
  1. How data will be entered/provided by partners
  2. Type and format of data indicators to be collected
  3. Needed system functionality
  4. Variety and use of reports
  5. Cost
(1) Partner Data Reporting

- Determine outcome being sought and get buy in from all partners
- Work with partners to establish what data to collect
- Determine resources available for facilitating data collection efforts
- Determine partners’ experience and capacity to collect necessary data metrics
Consider how partner will submit data to you:
- Word or PDF submission (data entry by grantee)
- Emailed submission of standardized form (data entry by grantee)
- Partner has access to and directly enters data into system

Outline in MOU with data partners which metrics expected to collect, when and how metrics will be provided

Create policies and procedures for data collection efforts
(2) Type & Format of Indicators

• Compile complete list of data to be collected including:
  – Name of metric
  – Description
  – Unit of measurement (e.g. persons, households)
  – Type of measure (count, percent)
  – Collection frequency (when/how often is data going to be collected)
  – Data source (survey, ACS, school district, police dept., etc.)

• Ensure metrics capture reporting requirements of all funders
(2) Type & Format of Indicators (continued)

• Ensure that your chosen system can handle, analyze and report all of your planned data types
  – Text fields
  – Calculating percentages based on inputs
  – Track change over time

• Ensure your system can easily adapt if indicators change over time
  – Funders may request new information
  – You may re-evaluate and add, delete or modify indicators
(3) Needed System Functionality

• Key system functionality questions to ask:
  – Number of users
  – Sharing and storing private information (PI)
  – Compatibility with other systems such as CN Inform, case management software, financial software
  – Ease of use
  – Ability to access and export underlying data for conducting detailed analysis
  – Ability to modify system, including metrics
  – Data submission validation
(4) Variety and Use of Reports

- Evaluate types of reports needed for external and internal audiences
  - Ability to create ad hoc versus canned reports
  - Ability to customize reports

- Types
  - Graphs and charts
  - Summary reports
  - Dashboards: snapshot of selected indicators (types may include management, program, and project dashboards)

- How easily can your selected system generate the reports you need?
(5) Cost

- Price ranges vary widely largely dependent on:
  - System chosen;
  - Staffing needs to manage system; and
  - How much customization needs to be done
- Determine upfront and on-going staff resources needed to set up and manage system
- Consider your budget for data staffing
- Determine number of needed user licenses
- Who will cover the upfront and on-going costs
  - Can partners contribute?
(5) Cost (continued)

• If purchasing software, need to determine:
  – Upfront price and on-going fees including licenses and hosting
  – Cost of making upfront changes to the system
  – Cost of on-going updates to the system

• Consider what comes with the software
  – Help desk
  – System customization services
Poll #2

• What will be/was the biggest driver of your system choice:
  – Cost
  – Staffing
  – Customization considerations
  – Data format and user interface
Summary: Characteristics of Useful System

- Compatible with other systems
- Enter and review all desired metrics
- Add or change metrics
- Multiple users can access system
- Different user roles depending on user needs
- Export data
- Reporting functionality
- Customer support
# Types of Systems

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<th>Type</th>
<th>Pros</th>
<th>Cons</th>
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<tr>
<td>Spreadsheets</td>
<td>- Low cost</td>
<td>- Only one person can access at a time</td>
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<td>- Minimal staff time to set up</td>
<td>- Limited ability to create reports</td>
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<td>- Version control</td>
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<td>- Difficult to track changes over time</td>
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<td>- Difficult to do narrative text</td>
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<td>Database</td>
<td>- Low cost</td>
<td>- Only one person can access at a time</td>
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<td>- Minimal staff time to set up</td>
<td>- Need expertise to set up</td>
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<td>- Dedicated staff person/contractor</td>
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<td>that can customize database</td>
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# Types of Systems (continued)

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<th>Type</th>
<th>Pros</th>
<th>Cons</th>
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| Off the shelf reporting systems | - Reporting functionality  
- Multiple users can access system | - Can be difficult and pricey to customize  
- High upfront cost |
| Customized software           | - Can be built to specifications  
- Reporting functionality  
- Multiple users can access system | - High upfront cost  
- On-going maintenance cost  
- Cost associated with customization  
- Staff time needed to communicate requirements and set up system |
Implementing a System

• Solicit input from other grantees or organizations that have used the systems
• Get/review bids from various software vendors
• Determine upfront and on-going staff resources needed to set up and manage system
• Develop and implement staff training on use of system
• Map your data collection and implementation process
• Incorporate use of data system into your policies and procedures
Lessons Learned

- Choice Neighborhoods Grantees
  - George Németh, Seattle Housing Authority
  - Celia Yniguez, Sacramento Housing and Redevelopment Agency
  - Erik Krengel, Mercy Housing
Closing

• Questions

• Follow-up questions:
  – HUD Team Coordinator
  – Marsha.Tonkovich@comcast.net

• Next steps: HUD is planning a facilitated conversation for grantees to discuss the pros and cons of different performance measurement systems currently available and in use by grantees (Date TBD)