# Performance Management Self Assessment

## Introduction

### This performance management assessment tool will help us identify the extent to which the components of a performance management system and practices are in place, as required by the Public Health Accreditation Board. The assessment questions were developed by and for public health agencies and adapted specifically for PHMDC.   The questions serve as indicators of performance management capacity in our agency. The questions cover the elements, resources, skills, accountability, and communications to effectively practice performance management at PHMDC. We will use the results of this survey to help us build a performance management system where each ‘program’ will report on a defined number of key performance objectives in the future. ****Key definitions**** ****Performance management:**** The practice of using data to guide decision-making processes, identify trends over time, and inform necessary changes to advance PHMDC’s effectiveness in improving the public’s health. Core components of performance management include:

### Performance Standards

### Identifying the outcomes (or objectives) that you are hoping to accomplish

### Performance Measurement

### Defining measures that help determine if you are accomplishing the objective(s) or not

### Setting targets that help determine the rate of progress

### Determining action steps to take to move the measure

### Collecting data

### Quality Improvement

### Using results of performance measurement to identify outcomes (or objectives) that are not being met

### Using quality improvement methodology and tools to address gaps and make changes

### Data analysis and Reporting

### Analyzing and interpreting data

### Reporting on a regular cycle

### ****Objective****: A long-term, systemic change the organization or program is looking to accomplish. For example: Reduce the number of people who die from diabetes   ****Measure****: An indicator of progress toward or away from an objective. For example: The number of people living at a healthy body weight or The number of people attending farmer’s market within the city limits   ****Target****: A way to show milestones and the rate of progress. For example:Reduce the diabetes mortality rate from 78.0 deaths per 100,000 to 66.6 deaths per 100,000   ****Action****: The activity we are doing to move the measure. For example: *Create a diabetes education toolkit* ****Completing this assessment**** In order to understand how performance management practices are or aren’t currently integrated into agency programs, we are including questions at the ****agency**** and ****program**** level. All PHMDC Division Directors should complete the survey (for the agency level only). All Supervisors should complete the survey with input from lead workers and staff.  How input is gathered from lead workers and staff will be at the discretion of the Supervisor. Any information shared outside of the Performance Management A-Plan Team will be shared in aggregate so that individual supervisors or programs are not identified. In this assessment, “you” does not refer to you as an individual. Rather, when answering questions, “you” can refer to your program (if answering program level questions) or the agency overall.   ****As you complete the survey, you will choose the best response that is closest to your division/program’s stage of development as follows:****

### ****Yes:**** Your agency/program explicitly does this activity or has the capacity in place.

### ****Somewhat:**** Your agency/program explicitly does this and/or has the capacity, but has room to improve.

### ****No:**** Your agency/program rarely, if ever, does this (by choice or because you do not have the capacity in place). What occurs is not the result of any explicit plan or strategy.

### ****Thank you for taking the time to complete this assessment!****

### 1) What is your name?



#### 2) Which division do you represent?\*

Community Health

Operations

Environmental Health

Policy, Planning and Evaluation

#### 3) Are you a supervisor?\*

Yes

No

#### 4) Did you attend the InsightVision leadership session on April 30?\*

Yes

No

## Agency-level Questions

### ****Please answer the following questions for PHMDC overall.****

#### 5) Please select a response for the questions below.\*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **No** | **Somewhat** | **Yes** | **I don't know** |
| Do leaders (Directors and Supervisors) nurture an organizational culture focused on agency performance and quality improvement? |  |  |  |  |
| Is there a commitment from high-level leadership (X-Team and Board of Health) to implement performance management practices? |  |  |  |  |
| Is there a process for assessing and evaluating the agency’s capacity to provide services based on community needs? |  |  |  |  |

#### 6) In which of the following areas does PHMDC utilize performance management practices? (Select all that apply)\*

Workforce Development (e.g. training, employee satisfaction, staff turnover)

Health and Racial Equity

Financial Systems (e.g. meeting budgetary goals, reporting on expenses by strategic priorities, diversity, growth and sustainability of funding sources)

Administrative Practices (e.g. policies and processes streamlined)

Programs (objectives are met, activities are completed)

Service Delivery (e.g., technical assistance, inspections, home visiting)

Other - please tell us: 

I don't know

#### 7) Please select a response for the questions below.\*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **No** | **Somewhat** | **Yes** | **I don't know** |
| Are supervisors trained to use performance management practices to measure progress on objectives? |  |  |  |  |
| Are supervisors involved in implementing performance management practices? |  |  |  |  |
| Is the agency strategic plan a part of PHMDC’s performance management system? |  |  |  |  |
| Is there agency capacity, financially, to adopt and sustain performance management functions? |  |  |  |  |
| Is there agency capacity, with regard to FTE, to adopt and sustain performance management functions? |  |  |  |  |
| Does PHMDC report on agency performance in meeting agency objectives? (Not just by program but as the whole agency) |  |  |  |  |
| Is there a plan for disseminating reports on agency performance (including who is responsible, how often, and methods of dissemination? |  |  |  |  |
| Are there efforts made to ensure that people outside of PHMDC understand agency performance data and can use them for decision-making? |  |  |  |  |
| Are there efforts made to ensure that PHMDC leadership (X-team, BOH) can understand agency performance data and reports and can use them for agency decision-making? |  |  |  |  |

#### 8) How is progress on objectives and measures used in the agency? (Select all that apply) \*

To set priorities

To allocate or redirect resources

To inform policy makers of the observed or potential impact of decisions under their consideration

To identify areas that require additional analysis and evaluation (e.g., potential quality improvement projects)

Other - please tell us: \*

I don't know

#### 9) Please select a response for the questions below.\*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **No** | **Somewhat** | **Yes** | **I don't know** |
| Is training available to help supervisors and staff identify program objectives, measures, targets and actions? |  |  |  |  |
| Is training available to help staff evaluate progress on performance objectives and measures? |  |  |  |  |
| Is training available to help staff report progress on performance objectives and measures? |  |  |  |  |

### 10) Would you like to add any comments?



**Page entry logic:** This page will show when: #3 Question "Are you a supervisor?" is one of the following answers ("Yes")

## Program-Level Questions

### ****Please answer the following questions for the programs (or teams) that you supervise. You will answer the questions for**** each program****.****

Validation: Must be numeric

### 11) How many programs do you supervise?\*



**Page entry logic:** This page will show when: #3 Question "Are you a supervisor?" is one of the following answers ("Yes")

## Program-Level Questions

### 12) Name of program [page("piped value")]\*



#### 13) Please select a response for the questions below.\*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **No** | **Somewhat** | **Yes** | **I don't know** |
| Do you identify objectives for your program? |  |  |  |  |
| Do you define measures that help you determine if you are meeting the objectives for your program? |  |  |  |  |
| Do your measures have clearly defined units (if quantitative)? |  |  |  |  |
| Do you set targets to show your progress in meeting your objectives? |  |  |  |  |
| Do you have processes and methods for choosing performance objectives, measures, and targets? |  |  |  |  |
| Do you use existing objectives, measures, and targets when possible (e.g., Leading Health Indicators, Healthy People 2020)? |  |  |  |  |
| Do your objectives include both process and outcomes measures? |  |  |  |  |
| Do you use customer/stakeholder feedback to develop your objectives and targets? |  |  |  |  |
| Do you use customer/stakeholder feedback to make program decisions or system changes? |  |  |  |  |
| Are objectives and measures selected in coordination with other programs, divisions, or organizations to avoid duplication of efforts or setting different targets for the same measure? |  |  |  |  |
| Are your program’s objectives, measures, and targets communicated throughout the organization? |  |  |  |  |
| Are objectives, measures, and targets communicated to stakeholders or partners? |  |  |  |  |
| Do you collect data for your measures? |  |  |  |  |
| Do you use other existing sources of data for your measures? |  |  |  |  |
| Do you analyze/evaluate your progress related to objectives, measures, and targets? |  |  |  |  |
| Do you report on your progress related to measures and targets? |  |  |  |  |
| Do you make sure PHMDC managers and staff can understand performance data and reports and can use them for program decision-making? |  |  |  |  |
| Are supervisors and employees held accountable for meeting program objectives and targets? |  |  |  |  |
| Are supervisors held accountable for reporting progress on objectives and targets? |  |  |  |  |
| Is there program capacity, financially, to adopt and sustain performance management functions? |  |  |  |  |
| Is there program capacity, with regard to FTE, to adopt and sustain performance management functions? |  |  |  |  |

#### 14) How useful are performance management practices within your program?\*

We do not currently use performance management within this program Not useful Somewhat useful Very useful

### 15) Would you like to add any comments?



**Page entry logic:** This page will show when: #4 Question "Did you attend the InsightVision leadership session on April 30?" is one of the following answers ("Yes")

## InsightVision Leadership Session

#### 16) Did you find the InsightVision leadership session useful?\*

Yes

Somewhat

No

#### 17) Of the following, which topics did you find useful? Check all that apply.\*

Background from A-Plan co-leads (PM plan, reason for choosing insight vision, role of leadership as cheerleaders)

Background information (Balanced Scorecard approach, OMTA)

Demonstration of InsightVision

Other - please tell us

### 18) Was there anything you would’ve liked more information about?



### 19) Do you have any concerns after the session?



### 20) After attending the session, what questions do you have about implementing performance management at PHMDC?



## Thank You!

### ****Thank you for completing the PHMDC Performance Management Asessment!****