



ACL's Performance Measure Guidance

**Administration for Community Living
Office of Performance Evaluation**

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TABLE OF CONTENTS

Overview	1
What is Performance Measurement?	4
What Makes a Good Performance Measure?	5
Benefits of Performance Measurement	6
Performance Management	8
Important Terms	10
Steps to Build Performance Measures	12
Aligning Goals & Objectives	12
Types of Data	13
How to Start Developing Your Performance Measures	15
Use logic models	15
Consider indicators	15
Include outputs, intermediate outcomes, and outcome indicators	16
Collect outcome data	16
OPE Five-Step Process for External Engagement and Collaboration	17
Performance Measure Checklist	20
Example Performance Measures	22
<i>Example 1</i>	22
Performance Measure Template	24
<i>Example 2</i>	25
Performance Measure Resources	26
References/Works Cited	27
SMART Performance Measure Checklist	29

Overview

The development and use of performance measures help Congress and executive branch agencies improve government operation and contribute to programmatic decision-making based on data and empirical evidence. As noted by U.S. Comptroller General Charles A. Bowsher in Congressional testimony (*Performance measurement: An important tool in managing for results*, 1990), Congress and executive agencies could improve accountability for programs and grantee results by:

- clearly articulating agency missions in the context of statutory objectives and citizen expectations;
- reaching agreements on realistic, outcome-oriented goals and the data needed to assess progress;
- developing implementation plans for agency goals and objectives and specific measures of progress toward achieving them;
- setting interim targets for agency operations;
- reporting annually on their progress; and
- actively overseeing agency performance in key areas.

The development and use of performance measures is not just a recommended practice; it is required. The 2010 Government Performance and Results (GPR) Modernization Act (P.L. 111-352) requires federal agencies to be held accountable for establishing processes, performance goals, and objectives. These processes and standards prioritize agency activities and investments and ensure leadership engagement in decisions with greater oversight of national resources and investments.

Recent legislation, such as H.R. 4174, the Foundations for Evidence-Based Policymaking Act of 2018 further supports the use of quality data to inform federal decision-making. Essential requirements include the documentation, coordination, and stewardship of data assets; identification of agency leaders responsible for data quality and management; and the development of learning agendas to identify further evidence-building needs. These requirements are further supported by annual updates to the Office of Management and Budget's (OMB's) A-11. These documents discuss the development of a Federal Performance Framework, focusing on leadership engagement in data-driven decision-making and quality assurance, including defined roles and responsibilities, to continue progress towards the stated mission, service, and stewardship outcomes. Additional

complementary guidance includes scheduled, quarterly data-driven reviews of evidence to assess progress toward learning agenda goals, annual reviews of progress toward agency goals, and transparent reporting of findings.

This guide introduces the practice of performance measurement, describing the components of a performance measure and its indicators and presenting a structured process for developing performance measures. It concludes with examples and resources for performance measure developers. This guide should be used in conjunction with additional resources, including consultation with the Office of Performance & Evaluation (OPE). Resources used throughout the guide include materials prepared by the Administration on Community Living (ACL), the Government Accountability Office (GAO), and the Urban Institute.

What is Performance Measurement?

Performance measurement is the systematic measuring of a program's activities, outputs, and outcomes and their relationship to the agency's or program's objectives. The GAO (2011) defines *performance measurement* as the “ongoing monitoring and reporting of program accomplishments, particularly progress toward pre-established goals.” The data collected from performance measures can enable program managers to make evidence-based decisions that improve or sustain progress toward programmatic goals (Hatry, 2014). Measures also influence agency operations, such as identifying inefficient or efficient processes and allocating resources.

What Makes a Good Performance Measure?

Measures should be relevant, applicable, focused, and quantifiable. Consider how relevant the measure is to the overall purpose of the program or the program's goals. The measure should apply to the specific activities or services provided by the program. It must be focused. Lastly, the measure must be quantifiable or assessable. If performance measures meet the above criteria, leadership and stakeholders will have “proof” that programs are producing the results expected. The data, or evidence, of program effectiveness gathered through performance measurement, particularly when aligned with the agency's strategic priorities, should influence the funding of critical programs and grants.

Performance measurement provides a “snapshot” of programs' progress towards their goals. Measurement at specified ongoing intervals reflects performance over time, thus providing longitudinal data to stakeholders. This information gauges whether a program is making incremental progress, such as a sustained systemic change.

Benefits of Performance Measurement

Performance measures can help answer three questions (adapted from Clear Impact, 2016):

- How much did the program or grant do (services delivered or activities conducted)?
- How well did you do (improved knowledge, skills, or behaviors)?
- Are recipients any better?

Answers to these questions influence federal investments, policy, and programs with reliable data to answer these questions are more likely to receive or maintain funding.

Performance measures:

- Improve accountability by promoting a focus on results, service quality, and customer satisfaction;
- Inform stakeholders in addition to enhancing Agency/Departmental, OMB, and Congressional decision-making;
- Monitor and assess program effectiveness, service delivery, improvement, and accountability by focusing on results, the quality of service, and customer satisfaction;

- Ensure compliance with the program's legislation by providing information on achieving statutory objectives and on the relative effectiveness and efficiency of federal programs and spending; and
- Increase public confidence in the federal government by holding federal agencies accountable for program results.

Performance Management

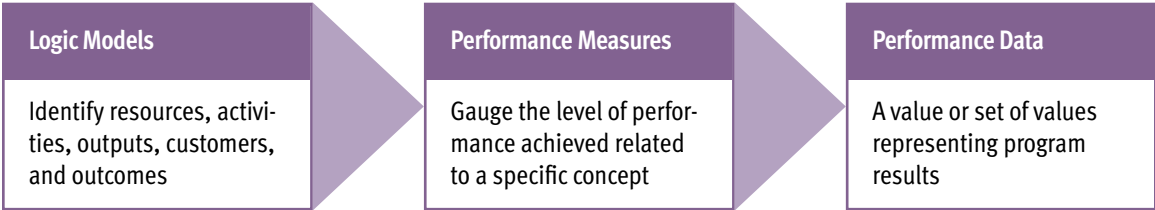
Performance management is the act of converting data into information to inform programmatic decision-making. It is the use of goals, measurement, evaluation, analysis, and data-driven reviews to improve the results of programs and the effectiveness and efficiency of agency operations. Performance management activities often consist of planning, goal setting, measuring, analyzing, reviewing, identifying performance improvement actions, reporting, implementing, and evaluating. The primary purpose of performance management is to improve performance and then to find lower-cost ways to deliver effective programs (OMB, 2020). Performance management activities often consist of planning, goal setting,

Managerial use of performance data was an explicit goal of the (GPRA) Modernization Act, an objective that eluded prior federal reforms. The Modernization Act established a new series of performance routines to encourage performance information use. The analysis shows that as federal managers experience those routines, they are more likely to report using performance data to make decisions. Specifically, routines centered on the pursuit of cross-agency priority goals, the prioritization of a small number of agency goals, and data-driven reviews are all associated with higher rates of performance information use. The authors also find that managers in better-run data-driven reviews report greater use of performance data.

Moynihan & Kroll. 2015

measuring, analyzing, reviewing, identifying performance improvement actions, reporting, implementing, and evaluating.

Performance management ensures goals are met effectively and efficiently. Key performance management tools include logic models, high-quality data, performance measures, and program evaluation. Logic models should show a connection between the overarching mission and goals of the agency and the program’s goals and objectives. Performance measures stem from the measurement of outcomes and outputs within the logic model. Collecting data is central to understanding the communities we serve and measuring the impact and effectiveness of our programs. The result of these activities is performance data representing program results. [ACL’s Performance Strategy](#)¹ presents a high-level approach to the planning, conduct, and implementation of performance management. This strategy, in conjunction with internal reviews of [ACL funding opportunity announcements](#)² (FOAs), represents ACL’s commitment to providing rigorous, relevant, and transparent performance data highlighting all the programs and initiatives ACL supports. It also reflects ACL’s continuous effort to build and enhance its repository of data and evidence, including high-quality performance data in support of our mission and vision.



1 [https://acl.gov/sites/default/files/programs/2018-07/Policy Review of FOAs_one pager 2018 .docx](https://acl.gov/sites/default/files/programs/2018-07/Policy%20Review%20of%20FOAs_one%20pager%202018.docx)
2 [https://acl.gov/sites/default/files/programs/2018-07/OPE PM Strategy FINAL 6-1-2018.docx](https://acl.gov/sites/default/files/programs/2018-07/OPE%20PM%20Strategy%20FINAL%206-1-2018.docx)

Important Terms

- **Goal:** A statement of the level of performance to be accomplished within a timeframe, expressed as a tangible, measurable objective or as a quantitative standard, value, or rate. For the purposes of this guidance and implementation of the GPRA Modernization Act, a performance goal includes a performance indicator, a target, and a time. The GPRA Modernization Act requires performance goals to be expressed in an objective, quantifiable, and measurable form unless agencies in consultation with OMB determine that it is not feasible (OMB, 2020, Section 200).
- **Indicators:** Performance indicators lie at the heart of an effective performance management system. They define the data to be collected and enable actual results achieved to be compared with planned results over time. Quantitative indicators use counts or percentages, whereas qualitative indicators describe observed or described changes. Hybrid indicators use tools, such as scales, to quantify qualitative data. Indicator definitions must clearly explain all terms and elements of the indicator to ensure consistent interpretation and ensure the intended measurements are reliably collected.

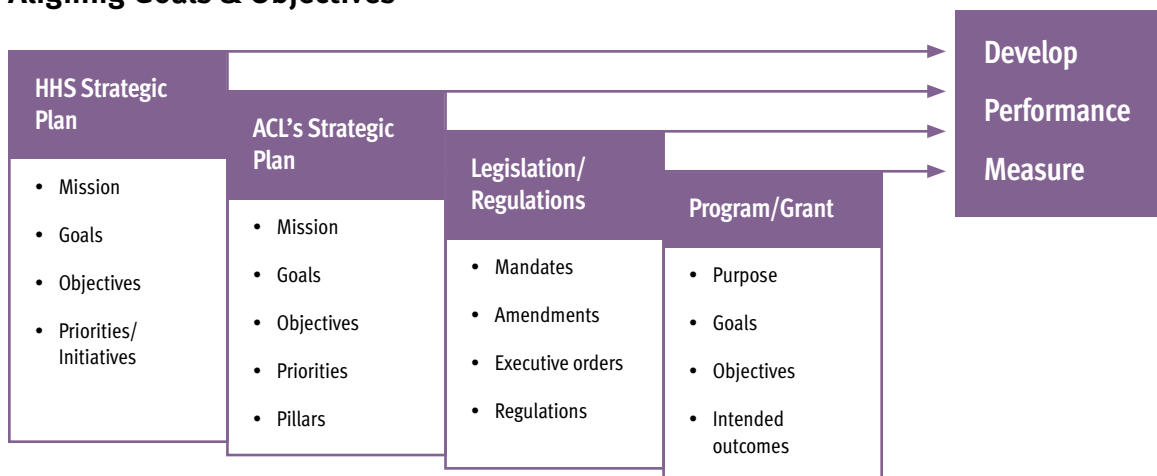
- **Performance Goals/Targets:** High but attainable standards of performance you aspire to achieve. Targets are often adjusted to reflect the performance of a grantee or organization over time. Targets can be raised or lowered depending on factors that influence the program, such as funding changes; environmental influences, such as a natural disaster; or unforeseen circumstances, such as a widespread outbreak or pandemic. Targets are more commonly changed when an organization consistently reaches its target to encourage continual growth and improvement. An organization that consistently fails to reach its targets may also need to revisit its targets to ensure that they promote real, incremental progress.
- **Objective:** The outcome or management impact the agency is trying to achieve, generally including the agency's role. Each objective is tracked through a suite of performance goals and other indicators (OMB, 2017).
- **Outcome:** The desired results or impact of a program (OMB, 2017).
- **Output:** Quantity of products or services delivered by a program, such as the number of inspections completed or the number of people trained (OMB, 2017).
- **Units:** The number of hours, percent of users, etc. tracked by the indicators. Numbers should note whether they are cumulative or specific to a reporting period.

Steps to Build Performance Measures

When building performance measures, focus on collecting data that is useful and necessary to ACL. The Urban Institute (2006) recommends that the development of performance measures include the participation of key stakeholders to ensure appropriate outcomes are tracked. Stakeholders are essential partners in the identification and development of performance indicators. Stakeholder involvement also helps to identify and minimize burdens associated with data collection.

ACL acknowledges the role of stakeholders but also reinforces the importance of aligning ACL’s strategic plan, the program’s goals and objectives, and requirements in federal legislation/regulations to develop measures and data collection tools that reinforce the foundation for the program. Connecting the strategic plan and performance measures is an ongoing process that involves aligning goals and objectives with outcomes and creating performance measures tailored to the strategic plan, programmatic requirements, and legislation.

Aligning Goals & Objectives



Types of Data

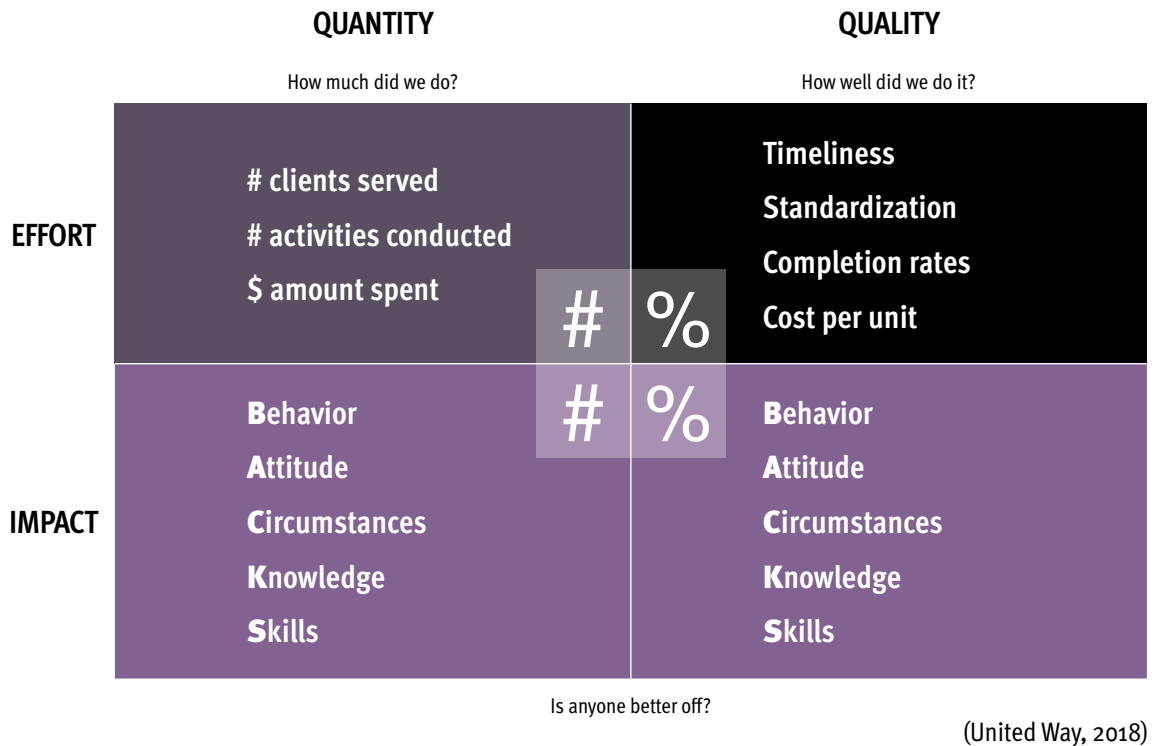
Measures can be quantitative or qualitative, with numeric data often used to monitor the number of inputs, products, and outputs. Qualitative data monitor dimensions of process, satisfaction, and the overall organization (outcomes).

	QUANTITY How much did we do?	QUALITY How well did we do it?
EFFORT	How much service did we deliver? #	How well did we deliver it? %
IMPACT	How much change did we produce? #	What quality of change did we produce? %

Is anyone better off?

(Clear Impact, 2016a)

One of the most important distinctions is the difference between outputs and outcomes; what we do (effort) versus our results (outcomes, benefits, impacts). This distinction applies to performance measures.



Using the illustration above, consider what you are measuring and how you are measuring/counting it, meaning the type of measurement (number #, percent %, ratio, etc.). Also, reflect on the population you are measuring, the unit of measurement (individuals with disabilities, older adults, parents or caregivers, families, organizations), and the type of measure: “how much,” “how well,” “how much better off” participants or organizations are.

How to Start Developing Your Performance Measures

Use logic models as a tool to help identify performance measures.

Logic models are visual descriptions of how a program functions: its inputs, activities, outputs, and outcomes. Logic models assist in identifying performance indicators by clarifying what actions are occurring in a program, how to measure them, and how these actions align with programmatic goals. ACL grantees, contractors, and cooperative agreement holders have all responded to funding announcements that describe necessary program design alignment with priorities and interests of ACL and U.S. Department of Health and Human Services (HHS) to secure funding. Measurement of specific ACL-required outputs and outcomes might already be necessary. For this reason, output and outcome data may be appropriate for performance measurement.

Consider indicators for which you already have data. Then consider indicators needed to measure outcomes for which you do not currently have data.

When developing performance measures, be considerate of the task of collecting data to ensure it is not a burden. The Paperwork Reduction Act of 1995 (PRA) gives OMB authority over the collection of certain information by Federal agencies. It is intended, “among other things, to “ensure the greatest possible public benefit from and maximize the utility of information created, collected, maintained, used,

shared and disseminated by or for the Federal Government” and to “improve the quality and use of Federal information to strengthen decision-making, accountability, and openness in Government and society” (United States Office of Performance Management, 2011).

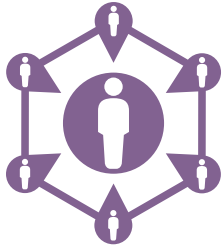
Include outputs, intermediate outcomes, and outcome indicators in performance measurement systems.

Output indicators tell you valuable things about the success of activities that contribute to an outcome. They are also often quantifiable. Including outputs and outcomes, when appropriate, in your performance design can provide valuable information useful to effective program management and communication to stakeholders.

Collect outcome data that identify the outcome.

Measuring outcome performance after program participation (e.g., such as in meal, transportation, or caregiver programs) provides information about the impact of a program. For example, in a program focusing on nutrition improvement among seniors, the correct desired outcome is sustained improved nutrition, not just improved nutrition during the participation period. For this reason, performance indicator developers should consider how they could track performance at set intervals, perhaps one or two quarters, after program completion to examine the real impact of a program.

OPE Five-Step Process for External Engagement and Collaboration



The value of any performance system depends on the quality of its data and how the data are used. These factors, in turn, depend on the buy-in and contribution of program stakeholders to the definition, collection, reporting, and use of performance data. Consider inviting stakeholders to participate in a workgroup when developing program performance measures. To successfully align federal goals and objectives with the intended outcomes of the program, ACL encourages performance measure developers to utilize the following process presented to simplify the performance development process and obtain buy-in from all stakeholders:

STEP 1: Present aim and concept of the workgroup with stakeholders.

This will establish a consensus among stakeholders on performance objectives and improve stakeholder understanding and support. Remind the group that performance data do not tell why a result occurred, and that they are not intended to reveal cause. Set ground rules and develop common expectations, such as that all members will be active participants, that meeting summaries will be made available, and that generally decisions will not be reopened after they have been agreed to by the group.

STEP 2: Review HHS, ACL, and program or grantee goals as a solid foundation for the group.

This typically includes a review of the program or initiative's authorizing legislation, funding opportunity announcements, and other guidance developed or approved by ACL.

STEP 3: Jointly develop or review (if already created) a logic model for the program or initiative.

Explain that the program or grantee's logic model provides a common framework for understanding how the program operates (inputs and outputs) and what it is designed to achieve (outcomes). This model will provide a foundation for the selection of performance measures. Continually comparing potential measures to the logic model outputs and outcomes can ensure that those measures remain focused on the stated goals of the program or initiative.

STEP 4: Collaborate to develop performance measures that support the goals and objectives while measuring outcomes/results.

Remember, some outcomes cannot be measured directly. Dually consider each output and outcome first to determine whether data currently exist to measure it. For those with existing data, discuss whether the data are of high quality. For outputs and outcomes that are not currently measured (or for which the data are not of high quality), discuss how data for those measures could be collected and whether the effort needed to collect those data (i.e., burden) is worth it or whether there are other outputs or outcomes that would be just as valuable.

STEP 5: Use the information about value and burden from the previous step to prioritize a few performance measures that, when taken together, provide an accurate reflection of your program or initiative.

You should also gain feedback on the clarity and feasibility of the performance measures and make tweaks as needed before implementation.

Performance Measure Checklist

Make sure each measure is “SMART” (i.e., Specific, Measurable, Attainable, Realistic, and Timely). To expand on this idea, the Association Forum (2013) recommends asking the following questions when developing performance measures:

- Is the metric objectively measurable?
- Does the measure include a clear statement of the results expected?
- Does the metric allow for meaningful trend or statistical analysis?
- Does the metric include milestones and/or indicators to express qualitative criteria?
- Are the metrics challenging but, at the same time, attainable?
- Are assumptions and definitions specified for what constitutes satisfactory performance?
- Have those responsible for measuring performance been fully involved in the development of this metric?

ACL recommends, in addition to asking the questions above when developing performance measures, considering the following High-Quality Performance Measure Checklist:

High-Quality Performance Measure Checklist	
Meaningful	<ul style="list-style-type: none"> • useful to stakeholders • supports the overarching goal or objective of the program or grant
Understandable	<ul style="list-style-type: none"> • clear (clearly and consistently defined) • context (explained) • concrete (measurable) • lack of ambiguity in direction
Relevant	<ul style="list-style-type: none"> • relates to objectives and activities • significant and useful to the users
Comparable	<ul style="list-style-type: none"> • allows comparison over time or with other activities • compatible with other performance measures
Reliable	<ul style="list-style-type: none"> • accurately represents what is being measured (valid, free from bias) • is not susceptible to manipulation • balances (complements) other measures
Practical	<ul style="list-style-type: none"> • uses data that are cost-effective to collect and report • is easily understood • uses data that can be obtained in a timely manner, without a burden to those collecting the data

Be sure to use definitions that clearly define the terms used in the measure, and make sure they align with the terms used throughout the data collection. Words that are subject to individual interpretation (e.g., “effective,” “quality,” “youth,” “vulnerable”) should be clearly defined, as should specific parameters such as populations, geographic areas, or eligibility scores. Describe how calculations are made and include the sources for the numerators and denominators.

Example Performance Measures

There are many examples of high-quality program performance measures available. The examples below show two high-quality measures and one poor quality measure.

Example 1

Objective: Promote awareness, knowledge, and understanding of disability issues to improve employment opportunities for individuals with disabilities.

Measure 1a: Increase awareness of reasonable work-related accommodations for individuals with disabilities by disseminating informational packets to a minimum of 2,000 local vocational organizations by October 2022.

Measure 1b: By 2024, 89% of employers will report that the XYY grant provided information that improved their knowledge and understanding of employment issues and rights.

Measure 1c: Increase the number of employers who receive information on employment issues, rights, and reasonable work-related accommodations.

Measure 1a [good example]	Measure 1b [good example]
<ul style="list-style-type: none"> • Specific: “increase awareness of work-related accommodations for individuals with disabilities” • Measurable: minimum of 2,000 organizations • Attainable: “increase awareness” • Realistic: 2,000 local vocational organizations • Timely/Time-specific: “October 2022” <p>Additional</p> <ul style="list-style-type: none"> • Shows directional change: “increase” • Meaningful: supports the overarching goal or objective • Understandable: lack of ambiguity in direction 	<ul style="list-style-type: none"> • Specific: “improved their knowledge and understanding of employment issues and rights” • Measurable: “89% of employers” • Attainable: “improve knowledge and understanding” • Realistic: 5,000 employers • Timely/Time-specific: “October 2024” <p>Additional</p> <ul style="list-style-type: none"> • Meaningful: supports the overarching goal or objective • Understandable: lack of ambiguity in direction • Comparable: allows comparison over time or with other activities
Measure 1c [bad example]	
<ul style="list-style-type: none"> • The measure is not measurable; it has no quantifiable target. • Providing information doesn’t demonstrate understanding. • Employers receiving information doesn’t prove an increase in knowledge or awareness. 	

Performance Measure Template

Using a standardized template to document performance measures can be useful during the development and communication of key components of a performance measure. Essential elements include a description of the measure, its type, the unit of measurement, the rationale for the indicator or measure, data source, and frequency of reporting. An example developed by the U.S. Agency for International Development (n.d.-1) is below. This type of template can also be helpful to organize performance measures.

Example 2

USAID Performance Indicator Reference Sheet
Name of Result Measured (Goal, DO, IR, sub-IR, Project Purpose, Project Output, etc.):
Name of Indicator:
Is this a Performance Plan and Report Indicator? No _____ Yes _____ for Reporting Year(s) _____ If yes, link to foreign assistance framework:
DESCRIPTION
Precise Definition(s):
Unit of Measure:
Disaggregated By:
Rationale or Justification for Indicator <i>(optional)</i> :
PLAN FOR DATA COLLECTION BY USAID
Data Source:
Method of Data Collection and Construction:
Reporting Frequency:
Individual(s) Responsible at USAID:
DATA QUALITY ISSUES
Dates of Previous Data Quality Assessments and Name of Reviewer(s):
Date of Future Data Quality Assessments <i>(optional)</i> :
Known Data Limitations:
TARGETS AND BASELINE
Baseline Timeframe <i>(optional)</i> :
Rationale for Targets <i>(optional)</i> :
CHANGES TO INDICATOR
Changes to Indicator:
Other Notes <i>(optional)</i> :
THIS SHEET LAST UPDATED ON:

Performance Measure Resources

In addition to the materials presented in this guide, we recommend further reading and consultation with OPE during the development of performance measures. The resources referenced below are freely available examples.

Administration for Community Living. (2018, June 1). *Administration for Community Living performance strategy*. <https://acl.gov/sites/default/files/programs/2018-07/OPE%20PM%20Strategy%20FINAL%206-1-2018.docx>

Centers for Disease Control, Center for State, Tribal, Local, and Territorial Support. (2015, March 2). *Develop SMART objectives*. https://www.cdc.gov/phcommunities/resourcekit/evaluate/smart_objectives.html

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U.S. Agency for International Development. (n.d.-2). *Performance monitoring & evaluation: Tips: Selecting performance indicators*. https://pdf.usaid.gov/pdf_docs/Pnadw106.pdf

Appendix A

SMART Performance Measure Checklist

(U.S. Agency for International Development, n.d.-2)

- Is the metric objectively measurable?

- Does the measure include a clear statement of the results expected?

- Does the metric allow for meaningful trend or statistical analysis?

- Does the metric include milestones and/or indicators to express qualitative criteria?

- Are the metrics challenging but, at the same time, attainable?

- Are assumptions and definitions specified for what constitutes satisfactory performance?

- Have those responsible for measuring performance been fully involved in the development of this metric?

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