Measuring Success: Translating a Strategic Plan into Performance Standards to Measure Program Impact

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Expanding Our Experience and Expertise: Implementing Effective Teen Pregnancy Prevention Programs
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Disclaimer

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WHO WE ARE

- **Mission**: As a 501(c)(3) non-profit organization, we are committed to the prevention of adolescent pregnancy in South Carolina through education, technical assistance, public awareness, advocacy and research.

- **Organizational Promises**: Communication with target market; Customization of approaches; Capacity Building at all levels of a community; Commitment to a long-term investment.
Objectives

- List five guiding rules for developing a data-driven strategic plan;
- Define a strategic goal’s impact through a set of performance measures;
- Describe the ingredients of a good performance measure; and
- Describe how performance indicators inform program development.
The SC Campaign’s Experience with Strategic Planning
Our Humble Beginning...1994

- $50,000 BUDGET
- We had:
  - 1 full-time
  - 1 half-time
- Working in DONATED SPACE
Today...17 Years Later...2012

$5,000,000
BUDGET

We have
• 22 full-time
• 8 part-time
STAFF

We pay lots and lots of rent
Our CEO (his name is Forrest) said:

Egads!
We need to strategize! We need a **PLAN**!
We had a plan for our **PLAN**...
This is our mission

Prevent Unplanned Teen Pregnancies
We have many needs

Births to really young girls

High Teen Birth Rates

Foster Care

Incarcerated Youth

Pregnant & Parenting Teens

Abstinence Only in the classroom

Unplanned pregnancies in older teens

STDs

HIV

Condom Access
We address needs by

- Communicating
- Building Capacity
- Evaluating and Conducting Research
Our planning committee was pretty smart, but we wanted this process to be inclusive.
We solicited ideas from all staff

Need to target AA boys

How do we involve parents?

We need to stick with EBP

18 – 19 year olds should be our priority population

GLBTQ youth are at high risk and often overlooked
Then we sorted through the data looking for themes.
What emerged...

5 Goals
But there still were challenges

“Teens have the right to access condoms and other forms of contraception.”

“Sexually Active Teens have access to condoms and other forms of contraception.”
And revisions...

Our board said:

“Our mission is teen pregnancy prevention – not HIV/STD prevention”
Need 100% buy-in from staff & board (don’t leave anyone out!)

Review
Comment
Revise
Commit
It’s even based on a model framework

- Policy
- Organizations
- Community
- Interpersonal
- Individuals
TA — DA!
High quality teen pregnancy prevention programs and services are available to SC youth.

High priority youth have access to teen pregnancy prevention services tailored to their unique needs.

Public schools are delivering age-appropriate, science-based teen pregnancy prevention programs.

Young people who are sexually active have access to condoms and other forms of contraception.

Parents and trusted adults are having open and honest conversations with their children about love, sex and relationships.
Process is Guided by What We Believe

- The prevention of adolescent pregnancies is in the best interest of the adolescents, their families and society;
- The most effective health and sexuality education is abstinence-first, age-appropriate and comprehensive;
- The use of research proven curricula and programs will reduce adolescent pregnancy;
- Communities play a key role in reducing adolescent pregnancy;
- Youth should be recognized as assets and involved as equal partners in all aspects of prevention activities in their communities; and
- The prevention of adolescent pregnancies will improve the health and economic prosperity of South Carolina.
Five Guiding Rules to Planning Strategically

• Operationalizes mission and vision
• Describes what you plan to accomplish over time and what you do NOT plan to accomplish
• Contains long-term goals (3 – 5 year outlook)
• Board, staff, and leadership provide input
• Guides goals and objectives of all funding proposals (RFP does not match SP – don’t apply!)
How do you measure your goals?

PERFORMANCE INDICATORS
Ingredients:
Performance Indicators

• Simple
• Measurable
• Change Over Time
• Reliable
• Meaningful
Putting it All Together

Strategic Goal 4:
Young people who are sexually active have access to condoms and other forms of contraception.
Putting it All Together

How Will We Know We’re Making Progress?

What Are We Doing to Achieve this Goal?
Our Program...

- Motivation
- Knowledge

Colleges

Clinics
- Friendly
- Easy Access

Contraception
- Increased Use...
Our Performance Indicators: 2011

• Hours of Outreach
• Number of 18-19 year olds reached
• Percent of clients who heard about clinic from outreach
• Number of 18-19 year olds @ clinics (unique)
• Number of 18-19 year olds @ clinics (dup)
• Level of Teen Friendliness
Dashboards

- Communication
- Condensed information
- Visual, interactive data
- Changes over time
- Tracks indicators of progress
Standard Colors

Emphasis Colors

*Information Dashboard Design, Stephen Few, p.89
<table>
<thead>
<tr>
<th>Fine Legibility</th>
<th>Poor Legibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Times New Roman</td>
<td>Script</td>
</tr>
<tr>
<td>Arial</td>
<td>Broadway</td>
</tr>
<tr>
<td>Verdana</td>
<td>Papyrus</td>
</tr>
<tr>
<td>Tahoma</td>
<td>Tempus Sans ITC</td>
</tr>
<tr>
<td>Courier</td>
<td>Old English</td>
</tr>
</tbody>
</table>

*Information Dashboard Design, Stephen Few, p.171*
Goal 4: Key Data Points for Funded Clinics

Change in Baseline vs. Current Unique Caseload, Cumulative to May 2011

- Clinic A: 23%
- Clinic B: 51%
- Clinic C: 3%
- Clinic D: 77%
- Sumter FHC: 7%
- USC Upstate: 2%
- Union: -31%

Monthly Visits, Cumulative to May 2011

- Clinic A: 431
- Clinic B: 538
- Clinic C: 402
- Clinic D: 375
- Clinic E: 46
- Clinic F: 85
- Clinic G: 5
- Clinic H: 105
- Clinic I: 229
- Clinic J: 155
- Clinic K: 183
- Clinic L: 180

Data is cumulative through Spring 2011

People Reached, Cumulative to Spring 2011

- Clinic H: 88
- Clinic G: 2,390
- Clinic F: 489
- Clinic E: 1,960
- Clinic D: 540
- Clinic C: 1,277
- Clinic B: 493
- Clinic A: 660

% of Clients Enrolled Partner College

<table>
<thead>
<tr>
<th>Clinic</th>
<th>29%</th>
<th>13%</th>
<th>22%</th>
<th>32%</th>
<th>66%</th>
<th>50%</th>
<th>44%</th>
<th>98%</th>
</tr>
</thead>
</table>

Return on Outreach

% of clients who heard about clinic via outreach activities

| Clinic | 12% | 1% | 3% | 12% | 58% | 74% | 3% | 36% |

*According to Marketing Surveys through Spring 2011

*According to Marketing Surveys Fall 2010, Winter 2010-2011 & Spring 2011

**Sites highlighted indicate a percentage greater than 50%
How We Used the Data

• Identify strong and weak performers
• Spark discussion – what is working, what is not
• Identify what else we need to know
• Help us stay on track
Performance Indicators and Program Improvement

• What we thought was important, didn’t seem to matter as much
  – Teen friendliness
• Power of a partnership
• The need to better understand outreach
Evolution of Performance Measures

• Less Emphasis:
  – Visits
  – Friendliness

• More Emphasis:
  – Contraception
  – Clinic-College connection
  – Frequency of reporting
More Data...

EXAMPLES FROM OTHER ORGANIZATIONS
Sales Dashboard (Data as of December 19, 2004)

Key Metrics YTD

<table>
<thead>
<tr>
<th>Metric</th>
<th>% of Target</th>
<th>Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>Poor, Satisfactory, Good</td>
<td>$913,394</td>
</tr>
<tr>
<td>Profit</td>
<td>Poor, Satisfactory, Good</td>
<td>$193,860</td>
</tr>
<tr>
<td>Avg Order Size</td>
<td>Poor, Satisfactory, Good</td>
<td>$5,766</td>
</tr>
<tr>
<td>On Time Delivery</td>
<td>Poor, Satisfactory, Good</td>
<td>94%</td>
</tr>
<tr>
<td>New Customers</td>
<td>Poor, Satisfactory, Good</td>
<td>1,247</td>
</tr>
<tr>
<td>Cust Satisfaction</td>
<td>Poor, Satisfactory, Good</td>
<td>4.73/5</td>
</tr>
<tr>
<td>Market Share</td>
<td>Poor, Satisfactory, Good</td>
<td>19%</td>
</tr>
</tbody>
</table>

Top 8 Customers This Quarter

1. The Big Wine Store
2. Wines 'R Us
3. Fruit of the Vine Inc.
4. Spirits of the Age
5. The Beverage Company
6. Sips and Bites
7. American Vintner's Best
8. Barrel and Keg

Product Sales YTD

<table>
<thead>
<tr>
<th>Product</th>
<th>Units vs Target</th>
<th>Revenue vs Target</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cabernet</td>
<td>Poor, Satisfactory, Good</td>
<td>Poor, Satisfactory, Good</td>
<td>149,003</td>
</tr>
<tr>
<td>Zinfandel</td>
<td>Poor, Satisfactory, Good</td>
<td>Poor, Satisfactory, Good</td>
<td>124,645</td>
</tr>
<tr>
<td>Chardonnay</td>
<td>Poor, Satisfactory, Good</td>
<td>Poor, Satisfactory, Good</td>
<td>105,934</td>
</tr>
<tr>
<td>Sauvignan Blanc</td>
<td>Poor, Satisfactory, Good</td>
<td>Poor, Satisfactory, Good</td>
<td>60,323</td>
</tr>
<tr>
<td>Merlot</td>
<td>Poor, Satisfactory, Good</td>
<td>Poor, Satisfactory, Good</td>
<td>52,624</td>
</tr>
</tbody>
</table>

Market Share

<table>
<thead>
<tr>
<th>Company</th>
<th>% of Total Market</th>
</tr>
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<tbody>
<tr>
<td>Eno Beverages</td>
<td>25%</td>
</tr>
<tr>
<td>Elysian Spirits</td>
<td>24%</td>
</tr>
<tr>
<td>Our Company</td>
<td>20%</td>
</tr>
<tr>
<td>Vintner's Best</td>
<td>18%</td>
</tr>
<tr>
<td>Golden Vines</td>
<td>16%</td>
</tr>
<tr>
<td>Harvest Delight</td>
<td>12%</td>
</tr>
<tr>
<td>All Others</td>
<td>11%</td>
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</tbody>
</table>

Revenue YTD

<table>
<thead>
<tr>
<th>Region</th>
<th>Actual vs Target</th>
<th>Actual</th>
<th>%</th>
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<tbody>
<tr>
<td>North America</td>
<td>Poor, Satisfactory, Good</td>
<td>243,585</td>
<td>28.3</td>
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<tr>
<td>Europe</td>
<td>Poor, Satisfactory, Good</td>
<td>201,865</td>
<td>23.4</td>
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<tr>
<td>Asia</td>
<td>Poor, Satisfactory, Good</td>
<td>195,766</td>
<td>22.7</td>
</tr>
<tr>
<td>South America</td>
<td>Poor, Satisfactory, Good</td>
<td>119,394</td>
<td>13.8</td>
</tr>
<tr>
<td>Middle East</td>
<td>Poor, Satisfactory, Good</td>
<td>101,624</td>
<td>11.8</td>
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Revenue QTD

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<th>Actual and Pipeline vs Target</th>
<th>Actual</th>
<th>%</th>
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<tbody>
<tr>
<td>Poor, Satisfactory, Good</td>
<td>47,273</td>
<td>25.5</td>
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<tr>
<td>Poor, Satisfactory, Good</td>
<td>44,936</td>
<td>24.3</td>
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<tr>
<td>Poor, Satisfactory, Good</td>
<td>39,254</td>
<td>21.2</td>
</tr>
<tr>
<td>Poor, Satisfactory, Good</td>
<td>32,734</td>
<td>17.7</td>
</tr>
<tr>
<td>Poor, Satisfactory, Good</td>
<td>20,973</td>
<td>11.3</td>
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</tbody>
</table>

*from presentation by Veronica Smith, data2insight, AEA 2010
Creating Evaluation Dashboards

*from presentation by Veronica Smith, data2insight, AEA 2010
Activity

• You are the “planning team”
  — Construct 3 goals based on the mission
    • How will you know if you’re reaching your goals?
  — What indicators of change will be tracked?

Idea! You can substitute your own organization’s mission and get ideas from the group!
Putting it All Together

- Strategic plans are your road map
- Performance indicators keep you from getting lost!
FOR ADDITIONAL INFORMATION:
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Columbia, South Carolina 29201
803-771-7700
www.teenpregnancysc.org