### PM Cycle

Organizations operating performance measurement systems use **indicators**, metrics that are tracked regularly, to assess their activities and supporting operations.

### PM Steps

<table>
<thead>
<tr>
<th>GOAL</th>
<th>CHECKLIST</th>
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| 1) Planning to Measure | • Designate performance measurement working group  
• Performance measurement audit documented in the template provided in Appendix A |
| 2) Choosing What to Measure | • Master indicator list in Appendix B with first two columns completed |
| 3) Determining How to Measure | • List of measurement tools, storage locations, and managers responsible for measuring indicators |
| 4) Preparing to Use Your Data | • Management dashboard *Appendix C*  
• Program-level dashboards *Appendix D*  
• Management dashboard review team and review schedule  
• Review team and schedule for program-level dashboards (if applicable)  
• List of measurement and reporting responsibilities  
• Understanding of the analysis and questions that the review team will engage in |
| 5) Putting your Performance Measurement System into Action | • First cycle of performance measurement system underway  
• Understanding of how to update baselines and targets and make additional refinements in future cycles  
• Plan for launching an external report card once you have completed a few measurement cycles |

**GOAL**

~ Assemble a working group that will develop your performance measurement system.  
~ Audit your current measurement activities.  
~ Choose the indicators that you will use to track your organization’s progress toward carrying out its mission.  
~ Compile your selections in a master indicator list.  
~ Determine how you will collect your data for each indicator, and select appropriate methods for storing your data.  
~ Specify when you will measure each indicator and who will be responsible for ensuring that your indicators are measured.  
~ Build your management dashboard and any additional program-level dashboards that you would like to use.  
~ Establish a team and schedule for reviewing your management dashboard and any program-level dashboards.  
~ Finalize measurement and reporting responsibilities.  
~ Understand how to analyze your data.  
~ Launch your Performance Measurement System.  
~ Prepare to update your baselines and targets, refine your PMS, and publish a report card for external stakeholders within the first few cycles of your PMS.

### MEASURE

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<tr>
<th>REPORT</th>
<th>IMPROVE</th>
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<td>To compile performance measurement data into a format that is easy to analyze, organizations can use two main types of reporting tools: a <strong>dashboard</strong> which includes both a management-level and a program-level, and a <strong>report card</strong>.</td>
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<td>Using these reporting tools, an organization’s leadership and other key staff members review and interpret performance data in order to make well-informed decisions and identify opportunities for improvement and necessary course corrections.</td>
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**THEME**

The organization implements its decisions to improve its activities and operations. From there, the performance measurement cycle begins again.

**Checklist**

- Designate performance measurement working group
- Performance measurement audit documented in the template provided in Appendix A
- Master indicator list in Appendix B with first two columns completed
- List of measurement tools, storage locations, and managers responsible for measuring indicators
- Management dashboard *Appendix C*
- Program-level dashboards *Appendix D*
- Management dashboard review team and review schedule
- Review team and schedule for program-level dashboards (if applicable)
- List of measurement and reporting responsibilities
- Understanding of the analysis and questions that the review team will engage in

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The purpose of any dashboard is to provide a snapshot of your organization’s progress on its way to its vision of success.” – pg. 37

Compiled by Jodi Beckstrom, Summer Fellow, Ash Center for Democratic Governance and Innovation, July 2011