



PERFORMANCE MANAGEMENT SYSTEM INVENTORY

This 10-15 minute inventory has been designed to provide you with assistance in evaluating your performance management system. It is based on the six guiding principles for performance management that have been adopted by Behavioral Pathway Systems. While this instrument should not be considered “hard science”, it can provide helpful perspectives on the strengths and weaknesses of your system. If you are questioning the value of your current system, this inventory will suggest where the problems might lie and what next steps might be helpful.

1. Is your system asking the right questions?

Is your system gathering information that is driven by the strategy and vision of the organization? Please enter the ten most important organizational priorities in Column A. In Column B, check those areas in which relevant performance data is available.

A. Key Organizational Priorities	B. Availability of Data
1.	<input type="checkbox"/>
2.	<input type="checkbox"/>
3.	<input type="checkbox"/>
4.	<input type="checkbox"/>
5.	<input type="checkbox"/>
6.	<input type="checkbox"/>
7.	<input type="checkbox"/>
8.	<input type="checkbox"/>
9.	<input type="checkbox"/>
10.	<input type="checkbox"/>

Item 1 Score:	<input style="width: 100px; height: 20px;" type="text"/>	Interpretive Notes: This score is based on the number of key organizational priorities for which data is available. A high score (above 7) suggests a significant degree of harmony between the organization’s priorities and the data generated by the performance management system.

2. Is your system using the right tools?

Please evaluate your performance management system tools (surveys, forms, inventories, tests, etc.) by checking all of the following applicable items:

<input type="checkbox"/>	Tools involve acceptable effort on the part of clients
<input type="checkbox"/>	Tools involve acceptable effort on the part of staff
<input type="checkbox"/>	Tools are relevant
<input type="checkbox"/>	Materials are easy to handle/store/manage
<input type="checkbox"/>	Inventory, survey, instrument costs are modest
<input type="checkbox"/>	Tools are viewed favorably by staff
<input type="checkbox"/>	Tools are viewed favorably by clients
<input type="checkbox"/>	Tools have been validated
<input type="checkbox"/>	Tools are easily understood
<input type="checkbox"/>	Tools reflect the clinical philosophies of the staff

Item 2 Score:	<input style="width: 100px; height: 20px;" type="text"/>	Interpretive Notes: This item score is the number of items checked. A high score reflects good selection of measurement instruments. A score of 5 or lower would suggest that the benefits of the tools may be outweighed by the effort involved or other factors.

3. Is your system supported by the right analyses?

Which statement most accurately describes your performance management system? Enter the most appropriate rating from 0 to 10 in the space provided below.

Description	Scale
Computerized data analysis is conducted that routinely provides detailed reports with external comparative benchmarks as well as customized supplemental analyses upon request	10
Computerized data analysis is conducted that provides basic reports as well as customized supplemental analyses upon request	8
Computerized data analysis is conducted that provides basic reports; no supplemental analyses or external comparative benchmarks available	5
Manual analysis of data provides basic reports	2
No data analysis is conducted	0

Item 3 Score:	<input style="width: 100px; height: 20px;" type="text"/>	Interpretive Notes: Performance management is a highly technical process that requires the proper expertise and support. A score below 5 is likely to leave many questions unanswered.

4. Is your system generating the right reports?

Describe the reports generated by your performance management system. From the list that appears below, please check all that apply.

<input type="checkbox"/>	Professional appearance
<input type="checkbox"/>	Well-organized
<input type="checkbox"/>	Clearly presented
<input type="checkbox"/>	Limited use of jargon/technical language
<input type="checkbox"/>	Good balance of narrative text and tables
<input type="checkbox"/>	Relevant information
<input type="checkbox"/>	Not too lengthy nor sparse
<input type="checkbox"/>	Distributed promptly and regularly
<input type="checkbox"/>	Key data is summarized into a dashboard
<input type="checkbox"/>	Drives decisions

Item 4 Score:	<input style="width: 100px; height: 20px;" type="text"/>	Interpretive Notes: This item score is the number of items checked. Performance measurement reports must be relevant and “user-friendly” to have value. If less than 6 items are checked, the value of your performance management system may be compromised. Reports may be filed or discarded rather than being utilized.

5. Is your system involving the right people?

Are you getting the full use of the data that is gathered? Please use the following scale to describe how individuals within the organization are involved in performance management activities. Enter your rating in the space provided below.

Description	Scale
Representative staff members at all levels within the organization are regularly involved in the selection, review, and response to performance data	10
Senior leadership, middle management, and occasionally line staff are involved in the selection, review, and response to performance data	8
Senior leadership and middle management are predominantly involved in the selection, review, and response to performance data; Verbal reports regularly go to line staff	5
Senior leadership and middle management are exclusively involved in the selection, review, and response to performance data	2
Senior leadership is exclusively involved in the selection, review, and response to performance data	0

Item 5 Score:	<input style="width: 100px; height: 20px;" type="text"/>	Interpretive Notes: Performance measurement data can provide the rationale and direction for helpful organizational change. The more outcomes data are shared among leaders and non-leaders, the more effective it can be in guiding the change process.

6. Is your system leading to the right changes?

In the past year, how many organizational improvement initiatives originated **directly** from the data derived from your performance management system? The score is the number of concrete initiatives that were implemented, up to a maximum of 10.

Item 6 Score:	<input type="text"/>	Interpretive Notes: If the answer to this question is “none”, your performance management system may not be adding value to the organization. A system’s contributions are largely measured by the concrete ideas for improvement that emanate from the resultant data.

SCORING SUMMARY

Total Score:	<input type="text"/>	Interpretive Notes: Total scores range from 0 to 60. The fit and the value of your performance management system should be reflected in the overall score. Certainly, scores below 30 are likely to be associated with systems where much untapped potential exists for performance management.

	1. Right Questions	2. Right Questions	3. Right Questions	4. Right Questions	5. Right Questions	6. Right Questions
10						
9						
8						
7						
6						
5						
4						
3						
2						
1						
0						
Score						