



WORKSHOP OUTLINE

Performance Measurement Series

Four virtual sessions building a measurement system a small team can sustain

FOUR SESSIONS

90 MINUTES EACH

VIRTUAL

WORKING SESSIONS

SERIES OVERVIEW

Most Organizations Report. Fewer Measure.

“Tracking what was easy to gather is how organizations end up able to describe everything they did and nothing they changed.”

Volume is what the system already captures, so volume is what gets reported. People served, sessions delivered, meals distributed. All true, and none of it answers the question a funder is actually asking, or the one a board should be asking.

This series builds the other thing. Four sessions, ninety minutes each, one a week, producing an indicator set the team chose, definitions two people would count the same way, a view leaders will actually open, and a standing meeting where the numbers change a decision. Teams work on their own programs throughout.

Who it is for

- Executive directors who answer for the numbers
- Program and data staff who produce them
- Finance leads reporting against funded outcomes
- Board members who receive dashboards and are unsure what to ask

How the sessions work

- Every team works on one of its own programs, start to finish
- An indicator set built, then deliberately cut to what is sustainable
- A baseline hunt through data the organization already holds
- A one-page view drafted for a real board meeting
- A review agenda the leadership team commits to before leaving

THE FOUR QUESTIONS

What are we claiming? · Would two people agree? · Who looks at it? · What changed because of it?

01

DEFINITION

What Are We Actually Claiming?

What change do we say we create, and for whom?

90

minutes

What this session covers

- Outputs, outcomes, and the gap most nonprofit reports never close
- Working backwards from the change you claim to the measures that would show it
- Choosing few enough indicators that a small team can still produce them in a year
- Cutting the list out loud, and recording what you decided not to measure
- Tying the set to the strategic priorities it is supposed to serve

YOU LEAVE WITH

A drafted indicator set for one program, already cut to what you can sustain

Bring with you

These are working sessions. The time is spent on your own documents, not on examples.

- One program you are willing to work on for four weeks
- Your strategic priorities, or whatever stands in for them
- Whatever you currently report to funders and to the board
- A rough sense of who collects what today

READ BEFOREHAND

Outputs vs. Outcomes

campbellconsults.com/blog-outputs-vs-outcomes

FOUNDATION

02

Definitions, Baselines, and Who Collects

Would two people in this organization produce the same number?

90

minutes

What this session covers

- Writing a definition precise enough that two people count the same way
- Finding a baseline in data you already hold, and what to do when there is none
- Naming an owner and an instrument for every measure, without exception
- Collection that survives a busy quarter, using the tools you already have
- Consent, confidentiality, and protecting the information you are now gathering

YOU LEAVE WITH

One measure defined end to end: definition, baseline, owner, instrument

Bring with you

These are working sessions. The time is spent on your own documents, not on examples.

- The indicator set drafted in session one
- Your intake forms and whatever database or spreadsheet holds the data
- Two or three years of whatever historical data exists
- The person who actually does the data entry, in the room

READ BEFOREHAND

Data Tracking 101 for Small Nonprofits

campbellconsults.com/blog-data-tracking-101

VISIBILITY

03

Building the View Leaders Open

What does a leader need to see, and what should they do about it?

90

minutes

What this session covers

- Designing backwards from the decision rather than forwards from the data
- Targets, thresholds, and agreeing in advance what counts as off track
- What a dashboard must never become: a data dump, vanity metrics, a reporting burden
- One page for the board and a working view for the team, and why they differ
- Keeping it alive after handoff, with a named owner and a refresh anyone can run

YOU LEAVE WITH

A one-page board view and a working team view, both drafted

Bring with you

These are working sessions. The time is spent on your own documents, not on examples.

- | | |
|---|--|
| ■ Your most recent board report, exactly as it was sent | ■ The measures defined in session two |
| ■ Any dashboard or scorecard you currently maintain | ■ A list of the decisions leadership actually makes each quarter |

04

USE

The Review That Changes a Decision

What happens in the meeting where these numbers get looked at?

90

minutes

What this session covers

- The review agenda that turns a dashboard into a decision rather than a presentation
- Reading variance: what to ask when a number moves, and when not to react at all
- Deciding in the room, assigning the follow-up, and closing it at the next review
- Reporting honestly to funders and boards, including what did not work
- The annual rhythm: when to revisit the measures themselves rather than the results

YOU LEAVE WITH

A review agenda, a date in the calendar, and an owner against every measure

Bring with you

These are working sessions. The time is spent on your own documents, not on examples.

- Your leadership or management meeting agenda as it stands
- The last report you sent a funder
- The views drafted in session three
- Whoever chairs the meeting where this will live

READ BEFOREHAND

From Strategic Plan to Action

campbellconsults.com/blog-from-strategic-plan-to-action

HOW EACH HOUR RUNS

Sixty minutes, on your own documents

The same shape every week, so teams know what to bring and what will be asked of them. Instruction is kept short because the value is in the twenty-five minutes where a team works on the thing it actually has to produce.

FIRST 10 MINUTES

Where this organization stands

Each team reports what changed since last week. Short and specific, and the reason the work happens between sessions rather than only inside them.

NEXT 30 MINUTES

The material

The concepts for that week in plain language, with examples drawn from real nonprofit reporting. Nothing theoretical that does not change what a team does on Monday.

NEXT 40 MINUTES

Building your own

The part that makes it a working session. Teams apply the material to their own program and produce that week's artifact, with the facilitator moving between them.

LAST 10 MINUTES

What is due next week

One concrete piece of work, sized to a busy week, named out loud so the group holds each other to it.

The participant toolkit

- An indicator selection worksheet
- The measure definition sheet
- A baseline worksheet for data you already hold
- A one-page board view template
- The quarterly review agenda
- A measure owner register

What you finish with

An indicator set for one program that the team chose and can sustain, every measure defined with a baseline, an owner and an instrument, a one-page view for the board alongside a working view for the team, and a standing review with a date and a chair. Templates are provided in editable form, so the remaining programs can be worked through without us.