

*Module 4*

# USING PERFORMANCE RESULTS



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An Overview for Workshop Participants





# Module 4: Using Performance Results

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It is not enough simply to undertake performance measurement activities—performance information must be *used* in order to be of value. Measures can also provide valuable information that can assist managers in managing their programs. By identifying the key determinants of success, and their influence on the outcome, appropriate strategies can be designed to achieve goals. In Alberta, while the level and quality of service for many programs has been redefined, it is still uncertain if appropriate levels have been identified. Especially important is determining whether programs are underperforming due to inadequate resources or if reallocating resources to other programs may be more effective in producing desired results.

- A number of US states and localities are using performance measures to assess progress towards strategic goals. One of the best-known examples is the state of Oregon, where the Legislature created the Oregon Progress Board—an independent state agency—to track the state’s progress toward achieving the goals of its 20-year strategic plan.
- Day-to-day use of a performance management system to plan, manage, and assess progress has helped the city of Grande Prairie significantly reduce service delivery costs while maintaining high levels of citizen satisfaction.
- The Tennessee Bureau of Alcohol and Drug Abuse Services has begun using outcome-based performance measures in its contracts with nonprofit providers of services to disadvantaged youths.

### Uses of Performance Measurement Information

As illustrated in the examples above, there are a number of ways that performance information can be used, including:

- **Accountability.** Performance measurement can be used to answer for one's defined responsibilities. One of the major reasons for implementing performance measurement in Alberta was the government's commitment to be open and accountable to the public. This policy direction has since become legislation under the *Government Accountability Act*. The key reports required under the *Act* are the business plan/budget, the financial reports, and consolidated annual reports including financial statements and a comparison of actual performance and the desired results.<sup>1</sup>
- **Strategic planning.** Performance measurement supports strategic planning and goal setting by gauging progress towards established goals. And, by showing what is working and what is not, performance data can help inform the next round of the planning process. In other words, are strategies working, or do new strategies need to be considered? Are the plan’s goals still appropriate given changing conditions and needs? Module 1 of this curriculum, *Strategic Planning*, discusses these issues in detail.
- **Benchmarking.** Performance data can be very useful for benchmarking—a practice described in Module 2 of this curriculum, *Benchmarking Best Practices*. In simple terms, benchmarking has been described as “learning from the pros.” But how does one identify these “pros” and determine what accounts for their success? Performance data provides a basis for identifying “best practices” by comparing the results achieved by organizations using differing practices, approaches, or processes. This in turn can lead to the identification of methods to improve service delivery and program performance.

- **Budgeting and resource allocation.** As discussed in detail in Module 5 of this curriculum, *Performance Budgeting*, the use of performance measurement in the budget process ties financial costs to program results. This leaves policymakers better prepared to assign priorities, expand or reduce programs, and accurately assess the costs of achieving desired results.
- **Contract monitoring.** As governments increasingly contract out the provision of services to private vendors, nonprofit organizations, and other governments, performance measurement becomes a critical tool in controlling risks and ensuring service quality. As discussed in detail in Module 6 of this curriculum, *Contracting for Performance*, contract monitors need performance measures in order to know whether or not contractors are fulfilling their performance obligations.
- **Interdepartmental collaboration.** By providing a clear direction for efforts in a particular functional area, performance measures can be used to promote interdepartmental communication and collaboration.
- **Communication with the public.** Public reporting of performance measures can enhance citizens' understanding and support of public programs.

## Users of Performance Information

Clearly, performance information can improve the decision making of a wide variety of users, including:

- Chief executives
- Elected officials
- Budget analysts
- Auditors
- Department administrators
- Program managers
- Program customers and stakeholders
- General public

Elected officials, for example, can use performance information to help determine the need for policy changes in certain functional areas and/or to guide resource allocation decisions.

Regular review of performance data can help chief executives avoid unpleasant “surprises” by directing attention to potential performance problems before they show up in newspaper headlines.

And performance measures have long been central to the work of provincial and local auditors.

But potentially the most important users of performance are program managers. In fact, many argue that a performance measurement system is not worth its cost unless the information it produces is useful to managers.

## How Can Managers Use Performance Information?

Managers can use performance information in four basic ways:

### *1. To monitor progress toward long-term strategic goals and to plan for the future*

Research shows that performance information is most likely to be used where there is a strong link between performance measures and planning.<sup>2</sup> Performance information can reaffirm an organization's strategic plan or indicate that it needs to be modified. Is progress toward goals and objectives being realized as expected? Are expected results being achieved? Does the plan need modification?

### *2. To improve service delivery*

The rationale behind performance measurement is to use information about organizational or program performance in order to *make things better*. Performance measurement systems can provide managers with important information about:

- Productivity in the organization;
- The effectiveness of the organization and its programs;
- The quality of the organization's products or services;
- The timeliness with which the organization delivers its products or services; and
- How a program/organization's performance compares to similar programs/organizations.

This in turn can help managers:

- Identify problem areas that need attention;
- Identify approaches that are working particularly well and might warrant replication in other settings;
- Better allocate resources among geographic areas or clientele groups; and
- Determine staffing and resource needs.

### *3. To manage personnel*

The ability of an organization to achieve its goals and objectives is closely tied to the performance of its employees. The establishment of clear *organizational* performance measures often goes a long way towards increasing the motivation of managers and employees—many of whom otherwise see little direct connection between their efforts and any long-term goals. But, performance measurement can also be integrated into the personnel appraisal process, providing an objective means of assessing the achievement of group and/or individual targets.

### *4. To improve both internal and external communications*

Performance measures can serve as an important tool of internal communication, relaying expectations, perceptions, and problems between managerial levels. Performance measurement can also lead to an ongoing dialogue with external customers through the use of tools such as surveys, interviews, and focus groups.

## What Affects the Use of Performance Information?

Unfortunately, the issue of use is often overlooked. All too often we assume that if information is available then of course it will be used. But use is far from automatic. It must be identified as a desired end and facilitated and encouraged along the way. Even the best performance information is of limited value if it is not used to identify performance gaps, set improvement targets and improve results.

There are a number of factors that influence the extent to which performance information is used, including:

- **Relevance of information to decision makers' needs.** It is important to recognize that different types of decision makers have different information needs. Performance information is most likely to be used if it is relevant to decision makers' needs and related to their job responsibilities.
- **Reporting procedures.** Not only must relevant information be collected, it must be reported in a way that is understandable and provides an appropriate level of detail. In this case, one size does not fit all. Different reporting formats are generally needed to meet the needs of different types of users. A program manager, for example, is likely to need a much greater level of detail than a citizen in the community.
- **Validity and appropriateness of measures.** The more that the methodologies used in the measurement process are perceived as valid and appropriate by the decision maker(s), the more likely the information is to be utilized.
- **Clarity of program goals.** Performance information is most likely to be used where there is clear consensus on program goals. In cases where there are hidden agendas or conflicting goals among stakeholders, performance information often goes unused.
- **Level of stakeholder involvement in development of measures.** Decision makers and other stakeholders are generally most supportive of performance measurement systems that they have helped to develop themselves. Not only are such systems most likely to address their needs, but they are also less "threatening" by nature. Indeed, many individuals feel very threatened when a performance measurement system is introduced, fearing that "negative" performance information will lead to budgetary or staffing reductions—or even program elimination.
- **Process used to develop performance measurement systems.** Poorly planned performance measurement systems are likely to go unused due to low quality and credibility. Poor planning can result in an inappropriate performance measurement focus, incorrect assessment of program goals, and an overall poor performance measurement process. Measurement tasks can be mismanaged and results are likely to be inaccurate.
- **Clarity of reporting guidelines.** Unclear reporting guidelines and rules can result in inaccurate or sloppy reporting by departments or agencies and late or incomplete performance reports.
- **Organizational constraints.** Bureaucratic constraints, or "red-tape," present barriers to the use of performance information. Difficulty in identifying programmatic goals due to inter- or intra-organizational disagreements, difficulties in performing measurement tasks, or difficulties in disseminating findings are examples of such constraints.



## Steps to Encourage the Use of Performance Information

The following steps are key to encouraging the use of performance information in the management process:

### ***Step One: Design the performance measurement system to encourage use.***

The quality and the appropriateness of the performance measures themselves have a great deal of effect on the overall credibility of the performance measurement system. If managers, decision makers, or line employees perceive the measures to be inappropriate, inaccurate, or irrelevant, participation in the measurement process may be jeopardized.

In order to help ensure that performance information will be used, the system should be designed so that:<sup>3</sup>

- Measures are used to track progress towards goals in business plan;
- A collaborative approach is used to develop measures;
- The focus is on results, not processes;
- Measures are relevant to the performance being measured;
- Measures are customized to fit specific programs;
- Multiple measures are developed to capture the complexity of programs, but at the same time, a limited number of meaningful measures are chosen;
- Measures are reliable—that is, they produce accurate and verifiable information;
- Measures are easily understood; and
- The data on which results are based can be trusted.

### ***Step Two: Demonstrate leadership commitment.***

Performance measurement efforts may initially be viewed with skepticism by managers who feel overburdened already and dread the additional chore of data collection. *Demonstrated* leadership commitment—including the *use* of performance information—can send the message that performance measurement isn't just a “waste of time.”

There are a number of ways that leaders can demonstrate commitment to the performance measurement process, including:

- *Establishing a legislative framework.* In Alberta, the Government Accountability Act, 1995 establishes the framework for performance measurement including use of performance results. In the US, a number of states and localities have enacted legislation that supports the performance measurement process. The state of Arizona, for example, enacted the Arizona Budget Reform Act of 1993 which calls for agencies to develop strategic plans and performance measures to support their budget processes.
- *Showing consistent legislative interest.* Legislators can show consistent interest in performance measures and their use at authorization, appropriation, budget, and oversight hearings.<sup>4</sup>
- *Discussing performance at regularly scheduled management meetings.* Chief executives and other top managers can demonstrate their commitment to performance measurement by holding regularly scheduled meetings where program managers are encouraged to be frank in discussing program results.<sup>5</sup>
- *Allocate adequate time and resources to the effort.*

### **Step Three: Provide training.**

Regular performance reports will not in and of themselves improve service delivery—or turn elected officials and employees into better decision makers and managers.<sup>6</sup> Legislators, managers, and line employees need training in using measures in order to improve performance and decision making.

The state of Oregon found that training in the mechanics of measuring performance and the positive uses of performance information helped to develop staff level support for performance measurement efforts.<sup>7</sup> Oregon's approach was to provide training to all agency heads as well as to volunteer co-ordinators in each agency. These co-ordinators—who also received ongoing guidance and assistance—served as mentors and trainers for others in their agencies. Two videos were developed to supplement the training efforts. The videos featured testimony from the governor, agency heads, a union leader, and line staff on the benefits of performance measurement.

As the state of Texas learned from its early experience, training for legislators should not be overlooked. Texas initially focused its training almost exclusively on agency managers, holding extensive workshops and providing technical assistance. In hindsight, key officials felt that there should have been an equally aggressive orientation effort for legislators, focusing on performance measurement and performance budgeting concepts. Indeed, they find raising legislators' understanding of and comfort with performance-based budgeting to be an ongoing challenge.<sup>8</sup>

At a minimum, both managers and policymakers should receive training on:<sup>9</sup>

- The benefits of performance measurement;
- The performance measurement process and the mechanics of developing measures; and
- Information on ways to use performance information, including allocating resources, formulating and justifying budgets, performance contracting, and personnel management.

### **Step Four: Provide incentives to encourage use.**

Granting public managers operational flexibility in exchange for accountability can provide motivation for embracing the process. A number of reforms that provide flexibility and incentives to line management have proven successful in other countries. These reforms include:

- *Simplifying management rules and regulations.* The governments of Australia, Canada, New Zealand, and the United Kingdom, for example, have simplified personnel rules, giving line management greater flexibility to recruit, assign, and pay staff.
- *Giving managers greater decision making authority over financial and human resources.* These same countries have given departments a lump sum of funds to spend on their operations. Departments are generally free to decide how to allocate funds across categories. The four countries have also eliminated staff ceilings so that departments can decide how to staff their programs within the limits of their operating budgets. Inefficient year-end spending is discouraged by allowing all or part of unspent funds to be carried forward into the coming year or years.
- *Providing incentives in the form of shared productivity gains or market-type mechanisms.* Market-type mechanisms in the four countries have included allowing departments to charge for services and retain the resulting revenues, opening up government-provided services to competition and allowing agencies to choose between government and private sector service providers.<sup>10</sup>

In the US, the federal government and a number of state governments are exploring these types of reforms. The federal Government Performance and Results Act of 1994 includes provisions to allow agencies to seek relief from certain administrative procedural requirements and controls. Texas rewards agencies that meet or exceed performance expectations with increased financial transfer authority, contract authority, or appropriations. And Georgia rewards innovations that yield ongoing savings for the state, allowing agencies to retain up to half of what is saved each year for the first three years.

**Step Five: Integrate performance information into management information systems.**

Using management information systems (MIS) to maintain, analyze, and report performance information is important to the success of a performance measurement system. Fortunately, rapid advances in computer technologies continue to enhance performance monitoring capabilities.

In order to integrate management information systems into the performance measurement process, data collection, maintenance, and reporting issues should be discussed alongside measurement issues. Involving a computer expert in the performance measurement planning process will facilitate the timely identification of any potential problems related to data maintenance or reporting.

Specific attention should be given to:

- Data sources;
- The relationship of measures to one another; and
- Desired reporting formats.

One model that other governments can consider in updating their MIS systems is the state of Minnesota's "Performance and Outcomes Reporting and Monitoring System." The system—known as PERFORMS—manages performance data from agencies on a statewide basis. It offers the ability to produce both internal and external performance reports in a consistent format. The information database is capable of maintaining at least 40 years of information, enabling a comparison of actual performance against long-term goals, objectives, and measures.<sup>11</sup>

**Step Six: Tailor reports to meet decision makers' needs.**

Communication has been described as "the link between performance and accountability."<sup>12</sup> Reporting performance information on a regular basis helps institutionalize the measurement process, ensures that performance information is made available at times that coincide with planning and budget cycles and other important decision making processes, creates incentives for program improvement, and helps build public support.

In adopting reporting procedures, you will need to decide who needs to receive performance information, how often to report this information, and what specific information to report. It is important to recognize that not all performance information will be useful to all users and decision makers. For example, what a line-manager finds useful will be significantly different from what an executive-level manager will find relevant. Because different audiences have differing information needs, reporting procedures will need to be tailored accordingly.

**Elected Officials:** Performance information should be provided at times that coincide with important decision making processes. In order to help elected officials make informed decisions about government programs, reports should be selective in the data presented, focusing attention on the most critical issues. The following tips should also be considered.<sup>13</sup>

- Linking performance information to an agency's strategic goals and mission will help users of the information judge the significance of what is being reported;

- Reports should include narrative explanations of good or poor performance, offering managers the opportunity to explain especially high or low numbers and giving policymakers a more complete understanding of the meaning of the data. Plans and schedules for achieving unmet goals should be included;
- Reports should include a description of the means used to verify and validate data; and
- Information should be presented in a “user-friendly” format, using visual aids such as graphs and tables, defining technical terms, and avoiding the use of jargon.

**Managers:** Managers will generally benefit from receiving performance information on a frequent basis—often monthly, and at a minimum, quarterly. Executive managers may need only a few key measures. In contrast, line managers will need more detailed data and will especially benefit from the disaggregation of data by geographic location, client characteristics, and other factors. Indeed, reporting only aggregate data can be misleading, clouding areas where improvement may be needed.

**Public:** Reporting to the public is generally done on an annual basis. Graphical presentations are often used to present key trends, accompanied by brief narrative explanations to help users understand the reasons for a given level of performance and to outline what the organization plans to do to improve its performance.

The important point to remember is to focus on what is truly important to each type of decision maker. Although it may be tempting to report all available data, excess information often does nothing more than overwhelm potential users.

### ***Step Seven: Integrate performance information into the personnel management system***

There is a common misconception that the sole purpose of using performance measures in the personnel appraisal process is to link performance to pay. In fact, a study of personnel appraisal processes in Southern US states found that the most important uses of performance measures were for employee development as well as communication between managers and employees.<sup>14</sup> Other uses included:

- Developing an inventory of employee skills;
- Assessing employee management training/development needs;
- Updating position descriptions;
- Validating selection promotion techniques;
- Making lateral movements in the organization;
- Making dismissal/demotion decisions; and
- Making promotion decisions.

Experience suggests that pay should be linked to performance only after the performance measurement system has become well-established in an organization and is widely accepted as valid and meaningful.<sup>15</sup>

The keys to effectively integrating performance measurement into the personnel management process include ensuring that:

- Each employee understands the agency’s mission and goals;
- Each employee’s performance standards are clearly related to the agency’s mission and goals are understood by both the employee and manager;
- There is an ongoing measurement and feedback system that provides information to the manager and employee; and
- The system rewards good performance and addresses poor performance.

**Step Eight: Review measures to ensure continuing utility.**

The development of performance measures should not be viewed as a one-time event. Even the most carefully crafted measures may need to be retooled or replaced from time to time in order to keep pace with changing conditions, needs, and knowledge.

Governments should review the utility of performance measures on an annual basis, including discussing the usefulness of data with program management and staff, agency executive management, agency financial management, customers, and stakeholders.

The following types of questions should be explored:<sup>16</sup>

- What do you want the measures to tell you?
- Are the measures working well?
- What problems have been encountered in trying to measure performance?
- Do you need additional measures?
- Are some measures useless?
- Are data not really available—i.e., too hard to acquire? Too expensive to acquire?
- Are data too difficult to use?
- What developments in the past year will influence current performance measures?
- How could performance reports be enhanced?
- What changes should be made in the way data are collected and analyzed?

**Step Nine: Review the organization's use of performance information.**

Periodic review of how performance information is being used will enable you to identify any barriers which need to be addressed:

- Are managers using the performance measurement system to establish relative priorities for matters deserving their attention?
- Do managers use performance data in preparing the organization's budget?
- Is performance data being used as a gauge in assessing individual performance?
- If information is not being used, why not? How can these barriers be addressed?

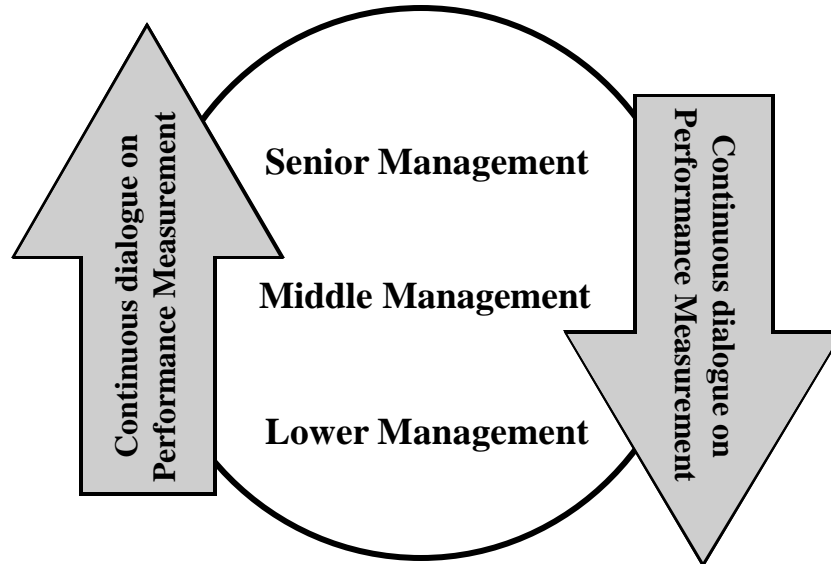
**The Organizational Context**

It is important to recognize that performance measurement is a dynamic process. Usable information is not limited to a monthly or annual report—the *process* itself makes a difference.<sup>17</sup>

In order to have a *useful, usable, and utilized* performance measurement process, a “whole-organizational approach” is advocated. What this means is that the *entire* organization *must* be considered in the practical management of performance measurement activities. *Figure 1* illustrates this approach.

Figure 1

The “Whole-Organization” Approach to Performance Measurement



**Source:** Julia E. Melkers, *Evaluation Utilization in the R&D Setting*, Ph.D. dissertation (Syracuse, NY: Syracuse University, 1993).

While senior managers communicate both programmatic as well as process expectations to middle and lower management, they in turn receive feedback and data that inform their understanding of the organization and its performance.

The organizational context is important to the ultimate success of a performance measurement system. As detailed in Module 7 of this curriculum, *Creating and Sustaining a Supportive Environment*, the development of an effective performance measurement system often requires extensive changes in organizational culture. Conducting performance measurement activities in an environment that is not receptive—or that is even downright hostile—is not only frustrating but self-defeating.

Taking steps to ensure that performance measurement has utility beyond mere “scorecarding” can go a long way towards addressing negative perceptions that might derail the process. Although performance measurement has the potential to act as an innovating force in organizations, the reality of this will be determined by how performance information is integrated into the day-to-day operations and decision making of the organization—in other words, by how the information actually is *used*.

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- <sup>10</sup> US General Accounting Office, *Managing for Results: Experiences Abroad Suggest Insights for Federal Management Reforms* (GAO/GGD-95-120, May 1995).
- <sup>11</sup> Charlie Bieleck, Minnesota Dept. of Finance, Presentation at the *Managing for Results* conference, Austin, Texas, November 1, 1995.
- <sup>12</sup> Epstein.
- <sup>13</sup> Adapted from: US General Accounting Office. Untitled. (GAO/GGD-96-66R, February 1996) and Hatry et al.
- <sup>14</sup> Doug Grider and Leslie Toombs, "Current Practices of Performance Appraisal as a Linking Mechanism for Human Resource Decisions in State Government," *International Journal of Public Administration*, Volume 16, No. 1, January 1993, pp. 35-36.
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- <sup>16</sup> Adapted from *Performance Measurement Guide* (Washington, DC: US Department of the Treasury, Financial Management Service, Nov. 1993), p. 31.
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