

RBA Implementation Self Assessment for Government and Nonprofit Organizations

1. Language Discipline (10)

- a. Has your group or organization adopted a common language using the Tool for Choosing a Common Language or some other method? Does this common language allow you to clearly distinguish population and performance accountability? (7)
- b. Can you crosswalk your language usage to that of your funders and other partners? (3)

2. Population Accountability (30)

- a. Has your organization identified one or more population level results or conditions of well-being stated in plain language to which your work contributes? (5)
- b. Have you identified the 3 to 5 most important indicators for each of these results? (5)
- c. Have you created a baseline with history and a forecast for each of these measures? (5)
- d. Have you analyzed the story behind these baselines? (5)
- e. Do you have a written analysis of what it would take to turn these conditions around at the national, state, county, city or community level? (5)
- f. Have you articulated the role your organization plays in such a strategy? (5)

3. Performance Accountability (45)

- a. Has your organization established the 3 to 5 most important performance measures for what you do, using the performance accountability categories *How much did we do? How well did we do it? Is anyone better off?* (5)
- b. Have you created a baseline with history and a forecast for each of these measures? (5)
- c. Do you track these measures on a daily, weekly, monthly or quarterly basis? (10)
- d. Do you periodically review how you are doing on these measures and develop action plans to do better using the performance accountability 7 questions? (10)
- e. Have you adapted your management, budget, strategic planning, grant application, and progress reporting forms and formats to reflect systematic thinking about your contribution to population conditions and your organization's performance? (5)
- f. Are the population and performance baseline curves you are trying to turn displayed prominently as one or more charts on the wall? (5)
- g. Have you identified an in-house expert to train and coach other staff in this work? (5)

4. Bottom line Quality of Service (15)

- a. Considering case mix difficulty, are you doing well or poorly on the most important *Is Anyone Better off?* measures compared to others? (Others = comparable providers, industry benchmarks, or reasonable targets or standards) (5)
- b. How are you doing on the most important *How well did we do it?* measures compared to others? (Others = comparable providers, industry benchmarks, or reasonable targets or standards) (5)
- c. Have you turned any curves? (5)

5. Bonuses and Penalties (-20 to +10)

- a. Research and Evaluation Bonus: Do you have (recent i.e. less than 3 to 5 yrs. old) research or evaluation evidence that shows your services cause improvement in customers' lives as shown by *Is Anyone Better off?* measures? Yes = plus 10 No = 0
- b. Skimming Penalty: Is there any evidence that you are skimming easy customers in order to increase success rates on *Is Anyone Better off?* measures? Yes = minus 10 No = 0
- c. Unit Cost Penalty: Given the intensity of your services are your unit costs per customer in line with other providers in the field? Yes = 0 No = minus 10

HOW TO USE THE RBA/OBA SELF ASSESSMENT:

The first, and in some respects most important, use of the RBA/OBA Self Assessment Questionnaire (SAQ) is as an implementation checklist. An organization could (should) periodically go through this list to see which of these things are being done. A simplified score could be computed as the percentage of SAQ items that are being done at all. There are 18 items listed. What percentage of the 18 are completed or in process?

The item-by-item scoring built into the SAQ is an add-on to this process that allows organizations to assess how they are doing on each item and create an overall composite implementation score. The score for each item is derived using the maximum points in parentheses after each item, and judging how far along you are to earning that maximum. The overall composite score is calculated by adding together the item-by-item scores. The three adjustments at the bottom are optional. This can then be plotted on a baseline and used in a turn-the-curve process.

There is no established good or bad score. Even though the scale runs from zero to 100, it can not be interpreted the way we do in education. A better way to think about the SAQ composite score is in terms of the progressive use of RBA. The scale below is one example.

- 0 - 20 Beginning to use RBA
- 21 - 40 Well along in implementing RBA
- 41 - 60 Developing expertise in RBA implementation
- 61 - 80 Moderately expert in RBA implementation
- 81 - 100 Expert in RBA implementation

Note that the SAQ in its current form is designed for organizations that deliver services and not for population level community partnerships. A population SAQ may be developed in the future, but It is possible to use the current version by considering the appropriate subset of questions applicable to your work.

- From posting on the RBA/OBA Facebook Group (August 2012)