

The Yukon Performance Measurement & Evaluation Framework

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Overview

Background

Approach

- Design Foundations
- Initiative Scale: Logic Development
- Organization Scale: Logic Integration
- Data Integration

Summary



Performance Measurement & Evaluation Framework (PMEF)

Background



PMEF Context & Intent

Context

- Mandate Letter commitment(s) for evaluation policy
- Gov't program evaluation experiences
- "Budget-Strategy Integration" requirement

Intent

Evaluators also require performance data collected by programs to assess program results over time.

- **Centred integration**
 - ID co-benefits
 - Apply multiple lenses
 - Nest logics
- "De-silo" actions within govt and with partners

*Most of the findings regarding the integration of performance measures in the evaluation process were critical and identified **continued program inabilities to measure their outputs and early outcomes**.*

Some reports stated that progress had been made in recent years, but none of them spoke to success on this front (e.g. "The documented availability of performance data is support of evaluations will improve").

Evaluating the Evaluators: What have we learned from "neutral assessments" of the Canadian Centre for Evaluation and its partners? (March, 2022; Canadian Public Administration 65(1), pp 122-143)

- **Obvious interpretation**
 - What data and information ARE and ARE NOT available



Design Challenges

Complexity

- Visualization, navigation

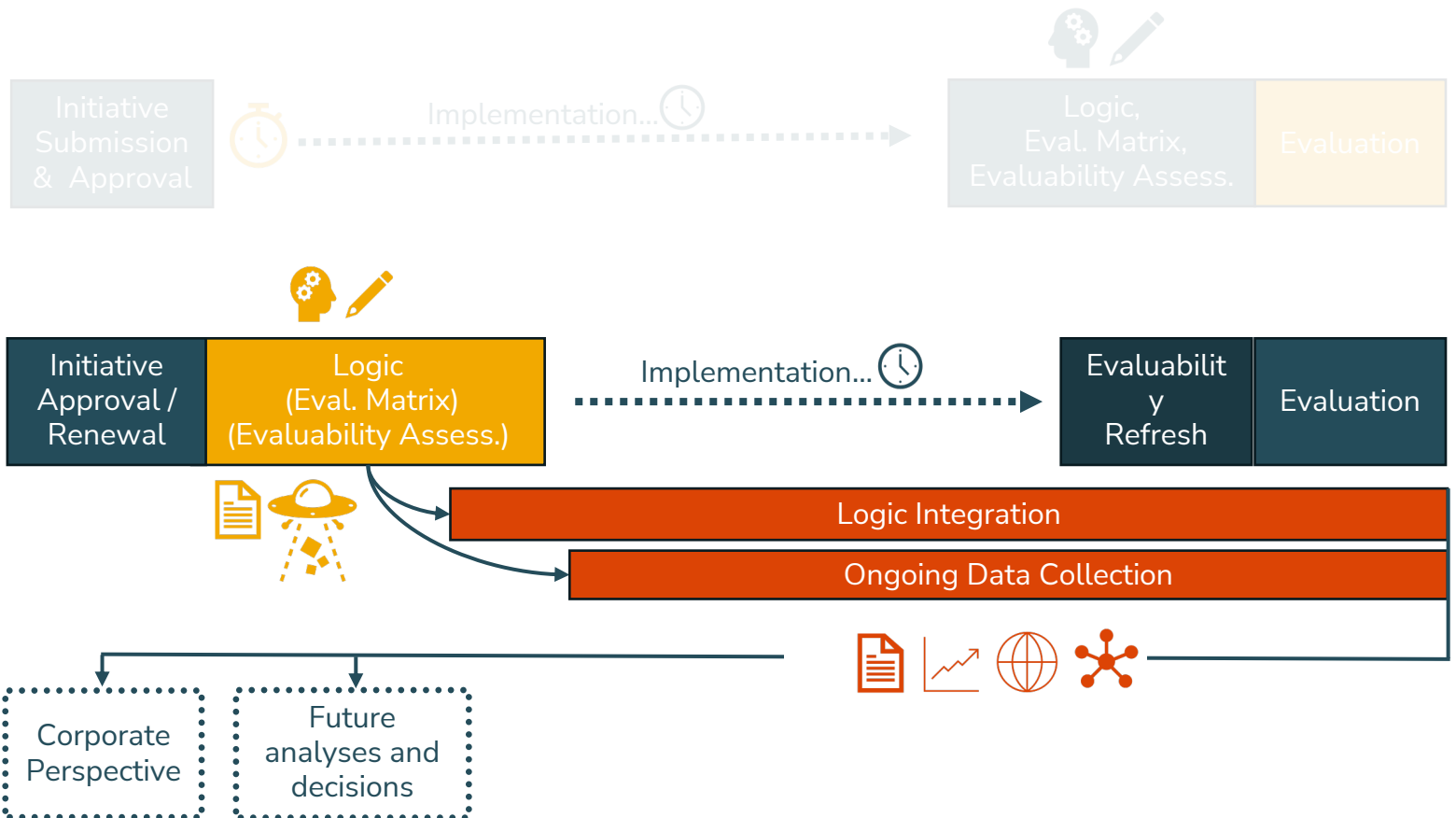


Consideration could be given in the future to incorporating the idea that all domains of quality of life are interconnected into the visual design of the framework.

The framework could also form the basis for the development of future policy development tools which could include a more sophisticated intervention logic;

however, given the complex inter-relationships between the various factors influencing quality of life, it is probably not feasible or desirable to attempt to map these relationships into a framework.

PMEF's Approach





PMEF Audiences, Purposes & Products

Purpose

Management
Support

Information to support:

- Active, evidence-informed management & evaluation; and
 - Proposals and requests
-

Analysis &
Decision
Support

Information about:

- What is KNOWN; anticipated & current/prior relevant results
 - What is or will be KNOWABLE; at what scope/scale
 - Operational context (whole-of-gov't, de-siloed)
 - Strategic alignment & financial flows thereof
-

Public
Reporting &
Data Access

Anticipated indirect, follow-on benefits



APPROACH

Design Foundations

Strategic Alignment

Per Henry Mintzberg:

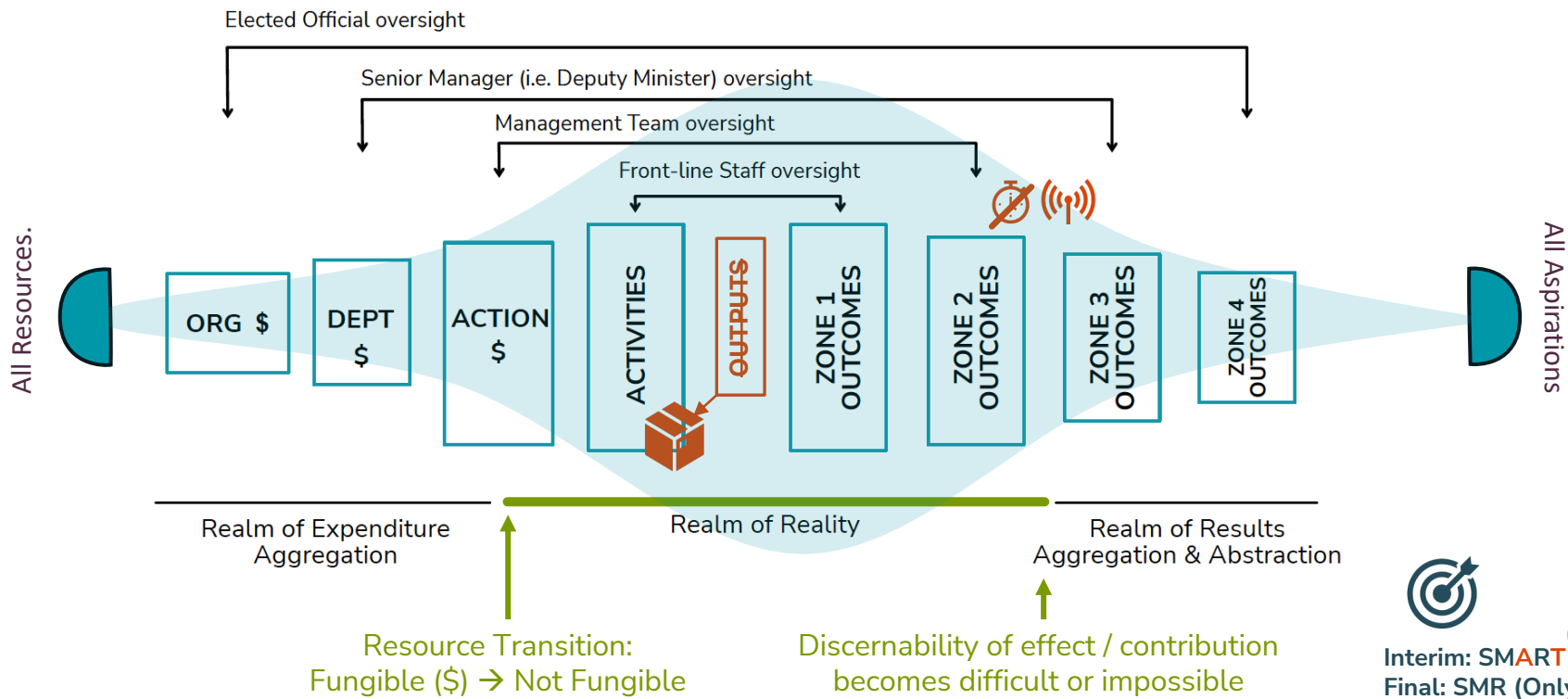
Intended Strategy: What we SAY.

Emergent Strategy: What we DO.



Initiative Logic

Adaptations & adoptions

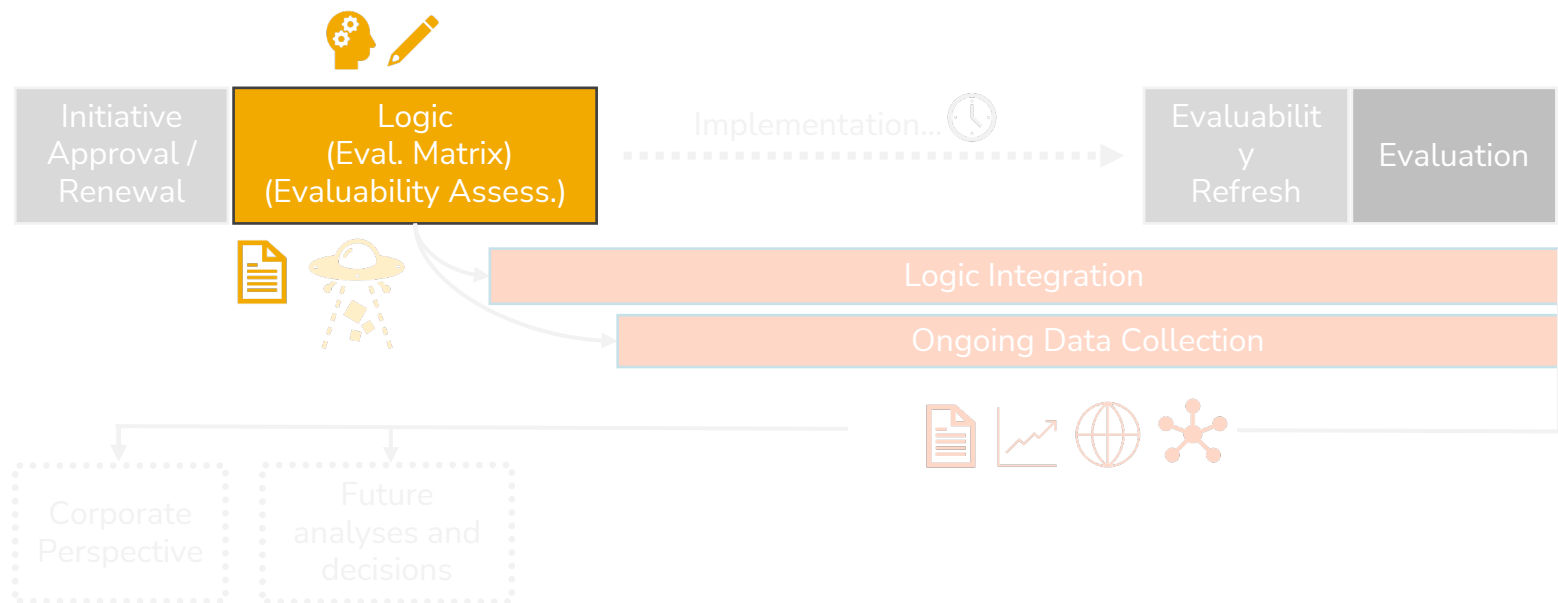




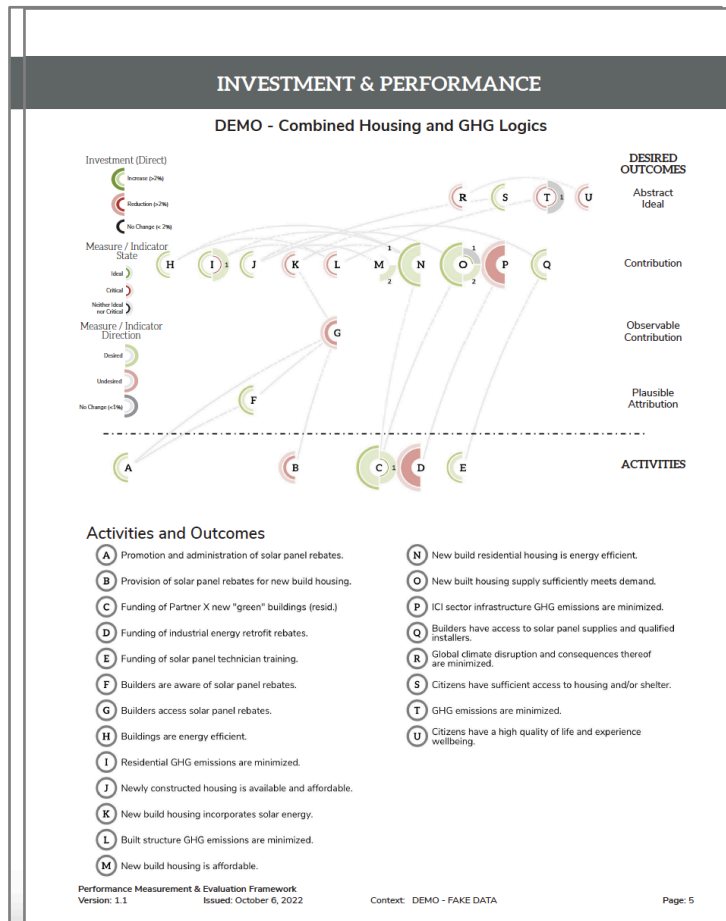
APPROACH

Initiative Scale: Logic Development

Step 1: Initiative Logic



Initiative Logic Construction



INVESTMENT

DEMO - Combined Housing and GHG Logics

	DIRECT INVESTMENT (\$000's)				CUMULATIVE INVESTMENT (\$000's)			
	PRV (21-22)	CRNT (21-22)	CHANGE (\$)	CHANGE (%)	PRV (21-22)	CRNT (21-22)	CHANGE (\$)	CHANGE (%)
A Promotion and administration of solar panel rebates.	100	200	100	+100%				
B Provision of solar panel rebates for new build housing.	1000	200	(800)	-80%				
C Funding of Partner X new "green" buildings (resid.)	8000	10000	2000	+25%				
D Funding of industrial energy retrofit rebates.	15000	10000	(5000)	-33%				
E Funding of solar panel technician training.	500	515	15	+3%				
F Builders are aware of solar panel rebates.	100	200	100	+100%	100	200	100	+100%
G Builders access solar panel rebates.	1100	400	(700)	-64%	1100	400	(700)	-64%
H Buildings are energy efficient.					9600	10915	1315	+14%
I Residential GHG emissions are minimized.					9600	10915	1315	+14%
J Newly constructed housing is available and affordable.	8000	10000	2000	+25%	8000	10000	2000	+25%
K New build housing incorporates solar energy.	1600	915	(685)	-43%	1600	915	(685)	-43%
L Built structure GHG emissions are minimized.					24600	20915	(3685)	-15%
M New build housing is affordable.					24600	20915	(3685)	-15%
N New build residential housing is energy efficient.	8000	10000	2000	+25%	9600	10915	1315	+14%
O New built housing supply sufficiently meets demand.	8000	10000	2000	+25%	8000	10000	2000	+25%
P ICI sector infrastructure GHG emissions are minimized.	15000	10000	(5000)	-33%	15000	10000	(5000)	-33%
Q Builders have access to solar panel supplies and qualified installers.	500	515	15	+3%	500	515	15	+3%
R Global climate disruption and consequences thereof are minimized.					24600	20915	(3685)	-15%
S Citizens have sufficient access to housing and/or shelter.					8000	10000	2000	+25%
T GHG emissions are minimized.					24600	20915	(3685)	-15%
U Citizens have a high quality of life and experience wellbeing.					24600	20915	(3685)	-15%

Performance Measurement & Evaluation Framework
Version: 1.1
Issued: October 6, 2022

Context: DEMO - FAKE DATA

Page: 6



Perspective Sharing

Conditions of Collective Impact success:

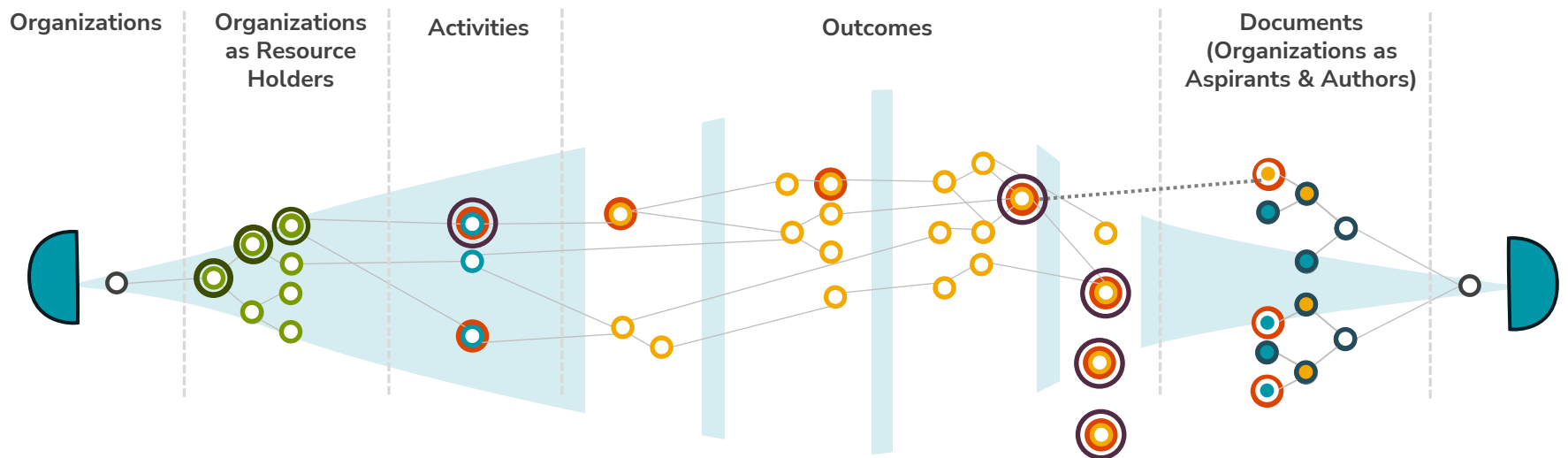
1. Common agenda
2. Shared measurement systems
3. Mutually reinforcing activities
4. Continuous communication
5. Backbone support organizations

Kania, John, and Mark Kramer. "Collective Impact." *Stanford Social Innovation Review* 9, no. 1 (2011): 36–41. <https://doi.org/10.48558/5900-KN19>.

- **What, if anything, about documenting external or multi-party stakeholder actions or perspectives would be attractive?**
- **What would be a challenge or a barrier?**
- **Why?**

Report Format Compatibility

Organizational KPI sets, scorecards, and similar.



Why the *Key* in a KPI?

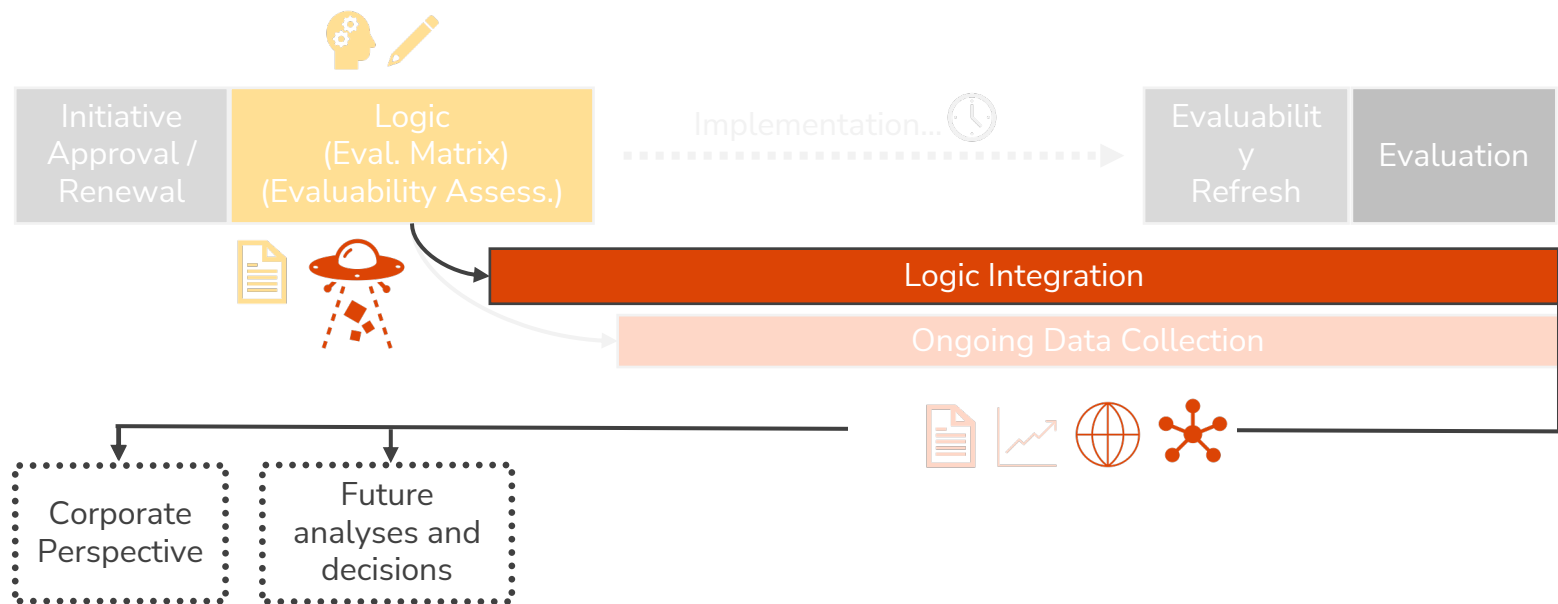
- **Selectivity & exclusion?**
 - The KPI is encompassing & representative
- **...or availability?**



APPROACH

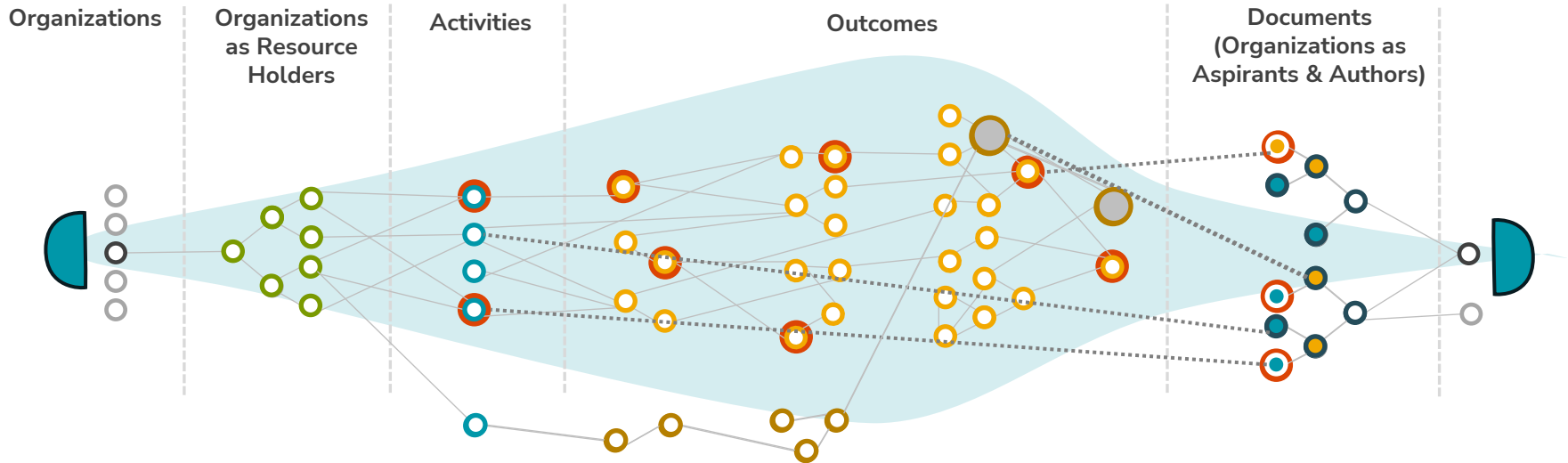
Organization Scale: Logic Integration

Step 2: Logic Integration



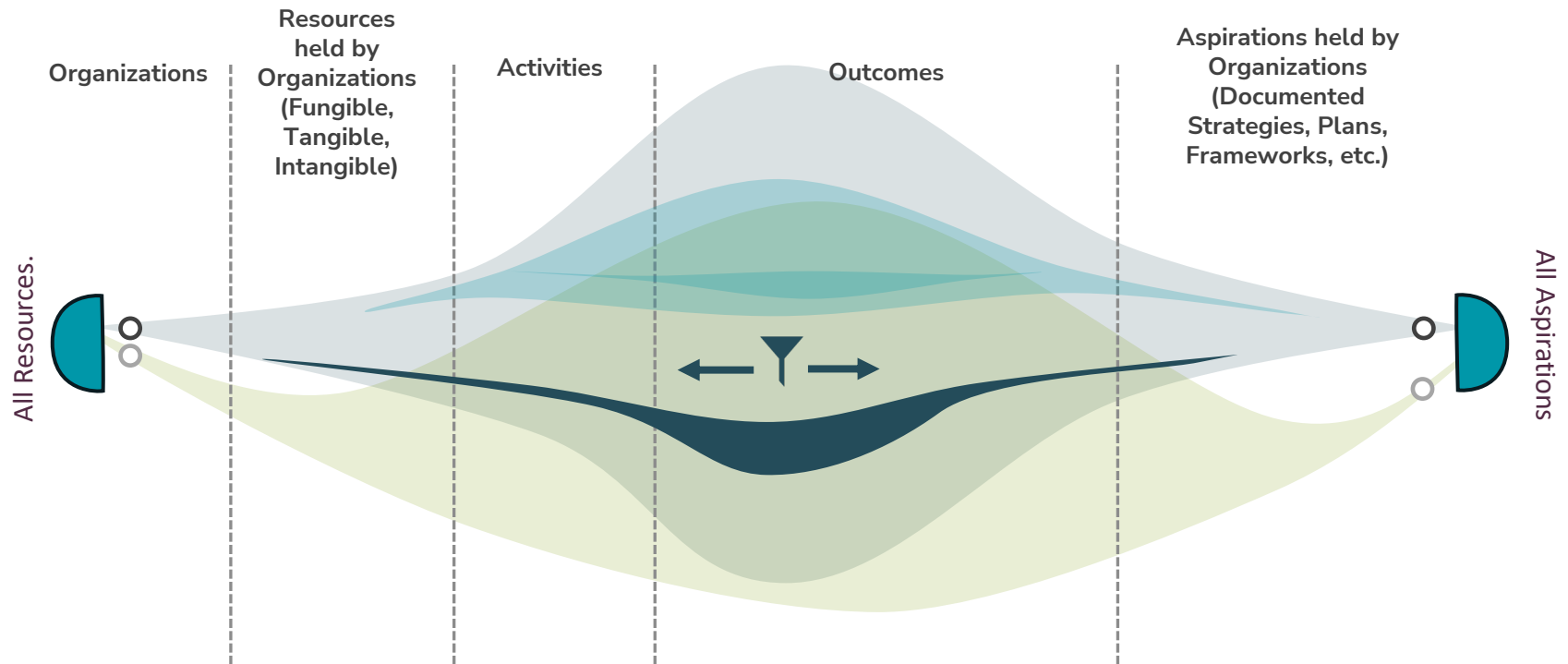
Integration & Visualization

Embracing & managing complexity



The *Shape* of Strategy

Extensible, nesting Logics.



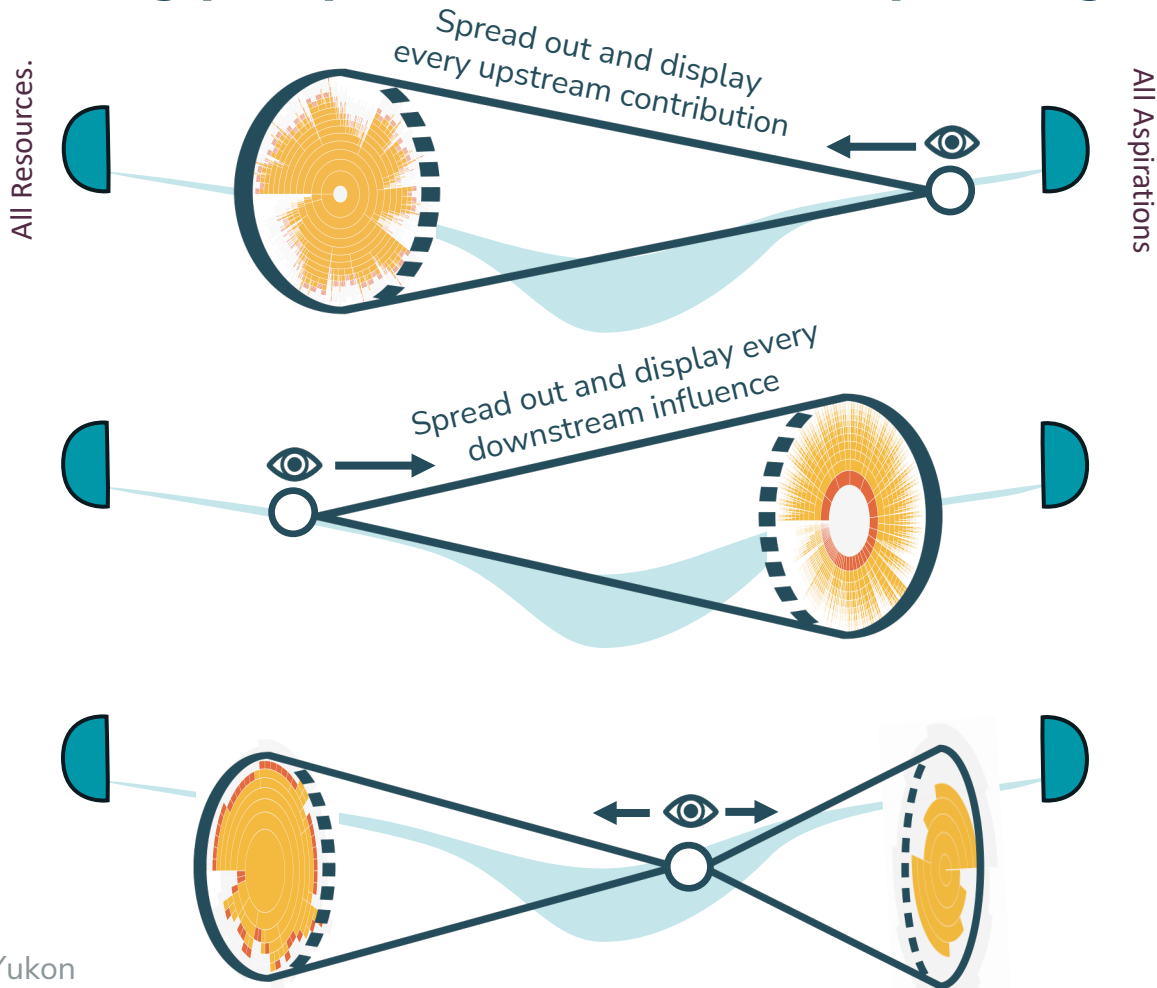


Spinney Wheel Demo

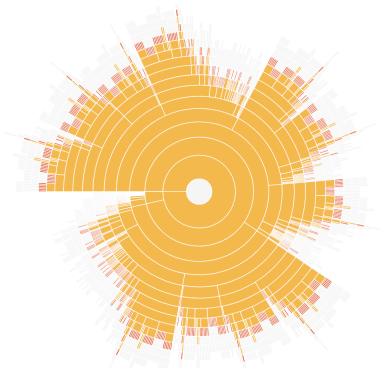


Spinney Wheel

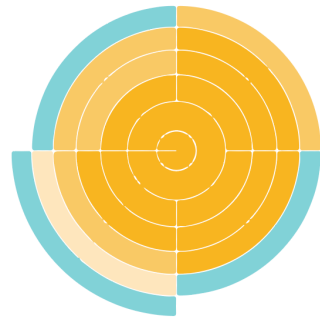
Staking perspectives within complex logics.



Adding insight with conditional formatting



“Base” Model



Categories

- Outcome Zone levels



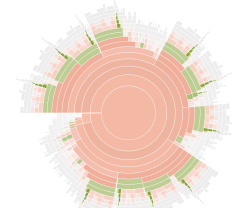
Presence / Absence

- Measures or Indicators
- Target and/or Threshold
- Data
- Priority Lenses applied
- Document Connections



Directionality

- Investments
- Results



Things get really interesting! Re-combinations of:

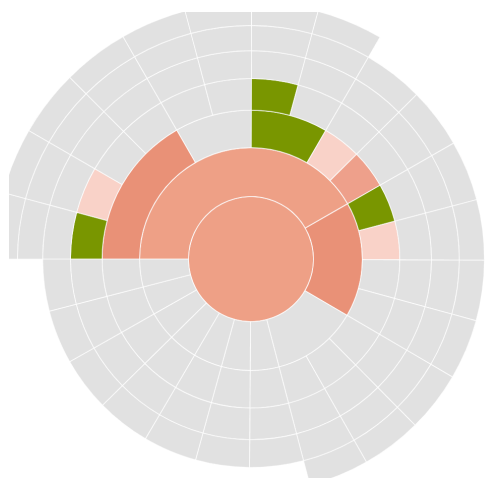
- Model content filtering
- Layered formatting filters
- Small multiple visualization (side-by-side model comparisons)



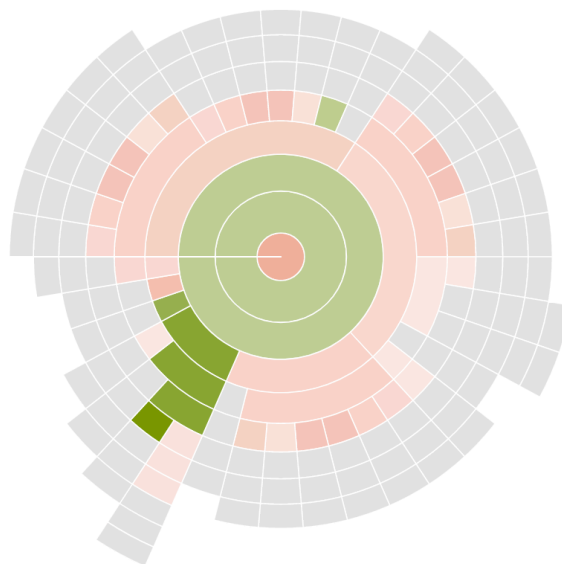
Revisiting Strategic Alignment

Comparing investment by subject.

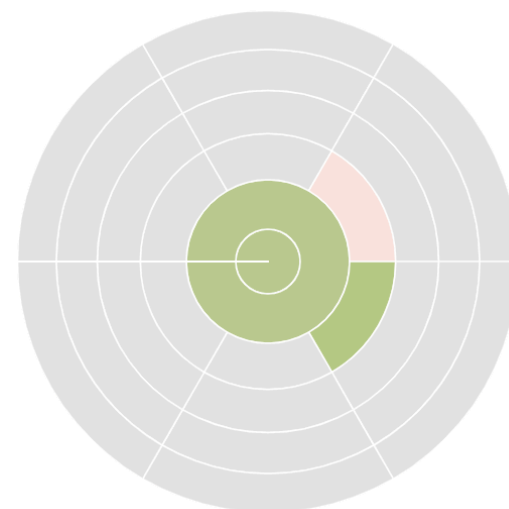
Climate Strategies



Housing Strategies



Training Strategies





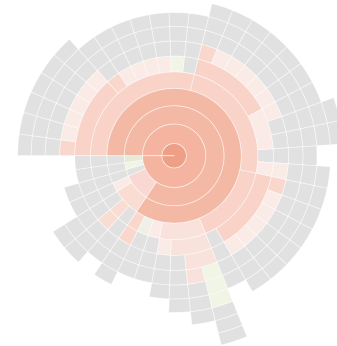
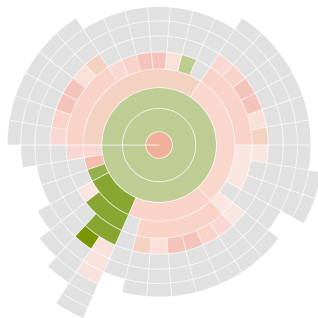
Revisiting Strategic Alignment

Comparing investment scenarios by subject.

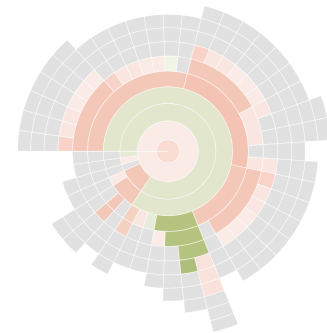
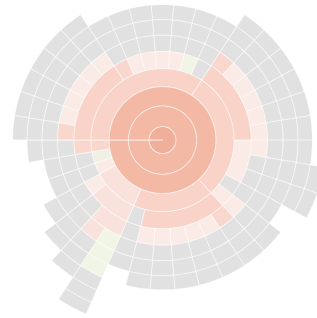
CLIMATE

HOUSING

Budget Scenario A



Budget Scenario B

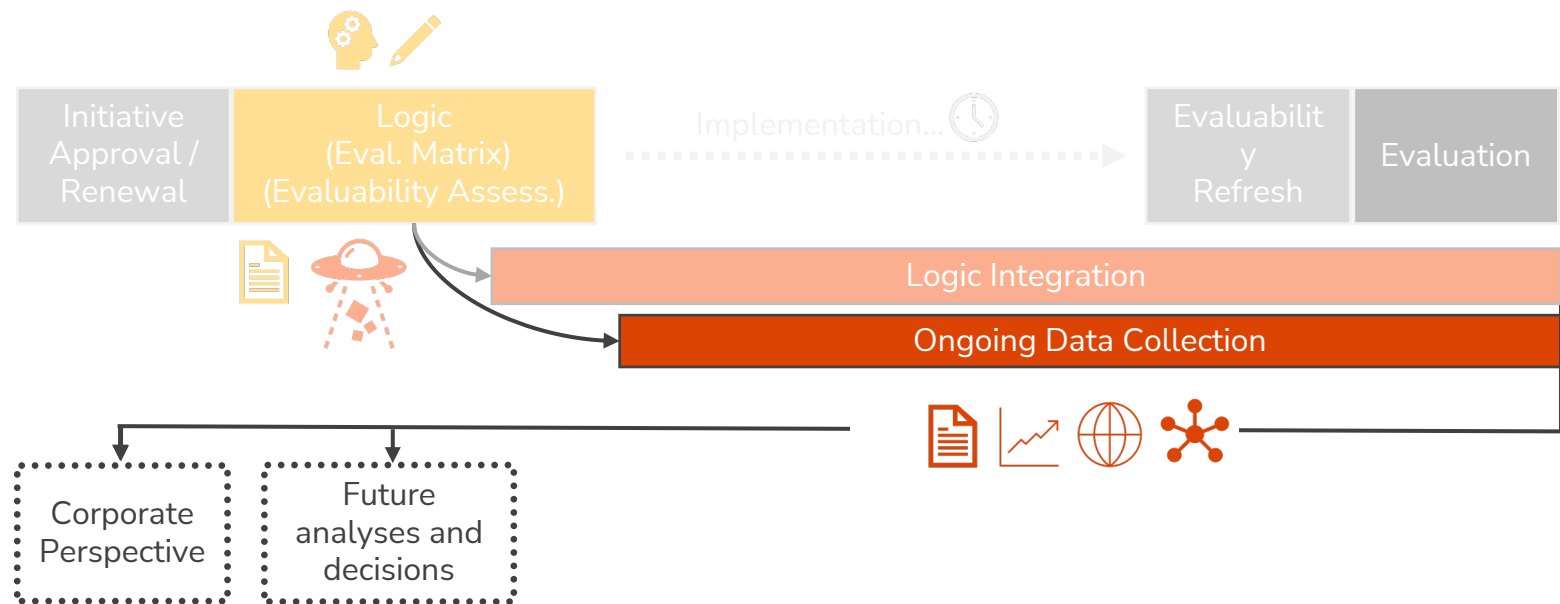




APPROACH

Data Integration

Step 3: Annual Updates, Data Provision & Reporting





Annual Reporting Window

Q1 each Fiscal Year

LOGIC & RESULTS

- **Current FY**
 - Changes to Logic (i.e. new Activities) or connections
 - Anticipated investments in Activities
 - Anticipated Measure & Indicator responses
- **Previous FY**
 - Measure & Indicator values

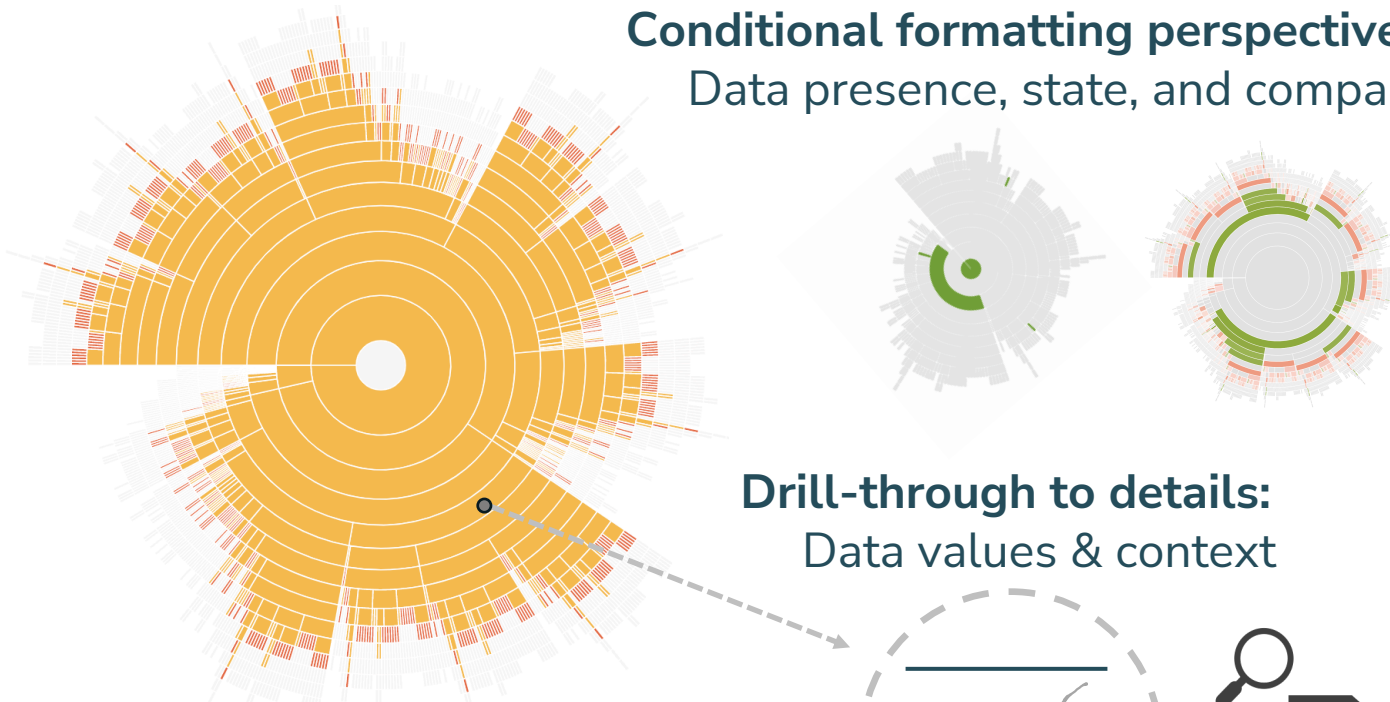
EVALUATION

- Inventory (declare/update)

Data Incorporation

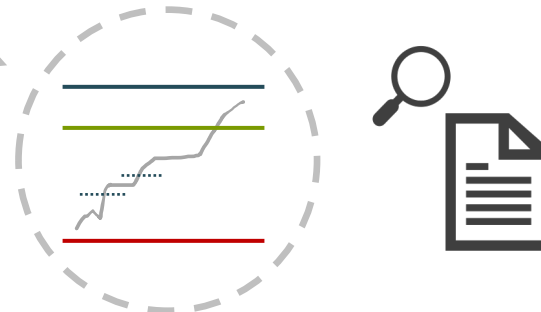
Conditional formatting perspectives:

Data presence, state, and comparison (incl. direction)



Drill-through to details:

Data values & context

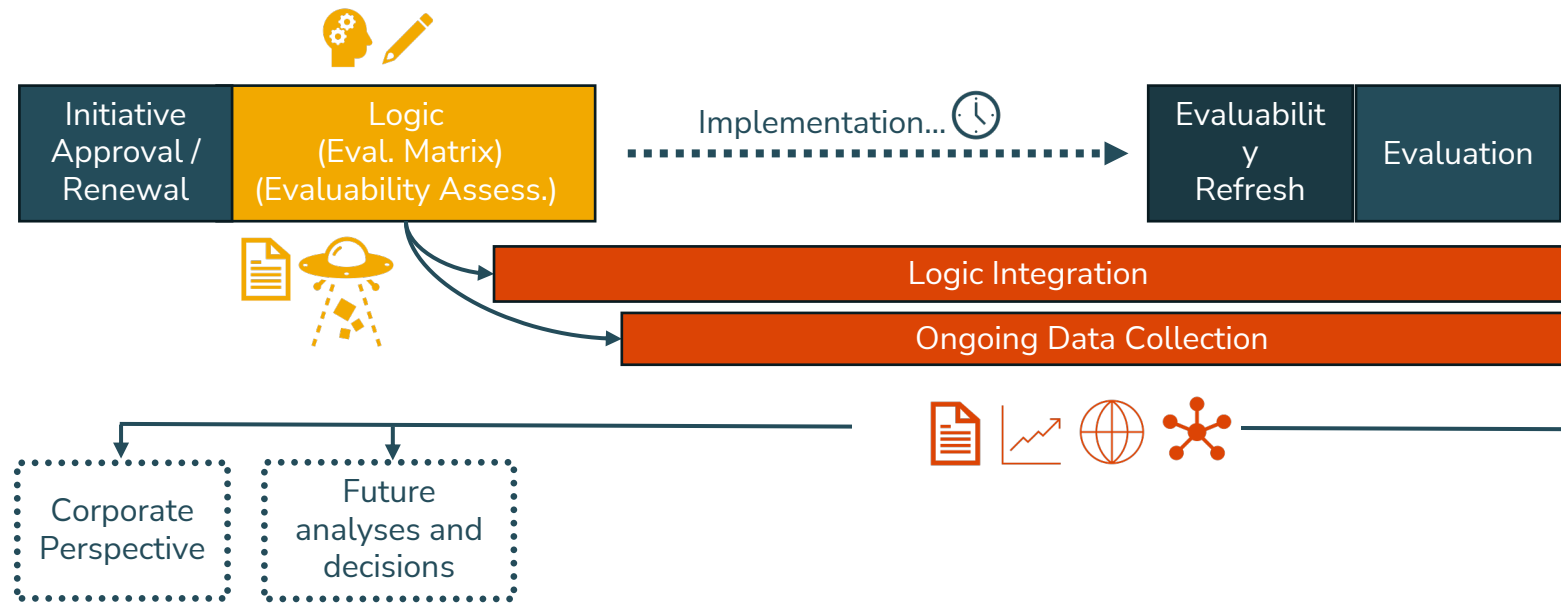




SUMMARY

Review

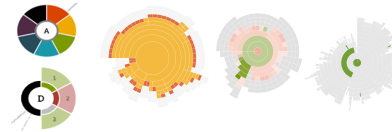
PMEF's Approach



Design Challenges

Complexity

- Visualization, navigation



Convention

- Conflation, structure, formatting

Text

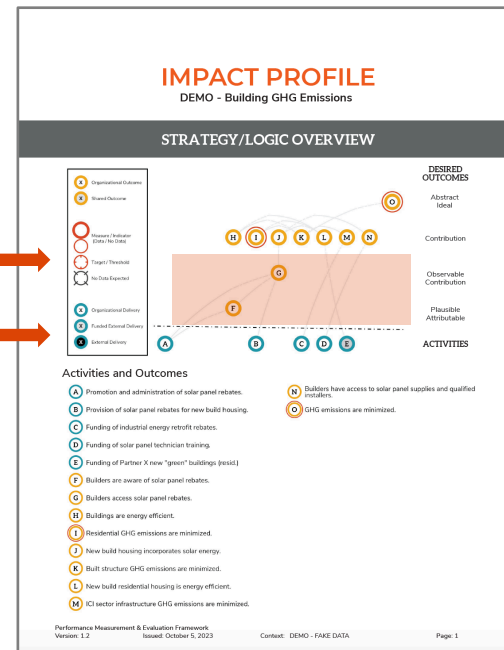
- Structure, volume

Priorities

- Evolution; multi-party



Culture & Capacity



Interim v. Final

KPI



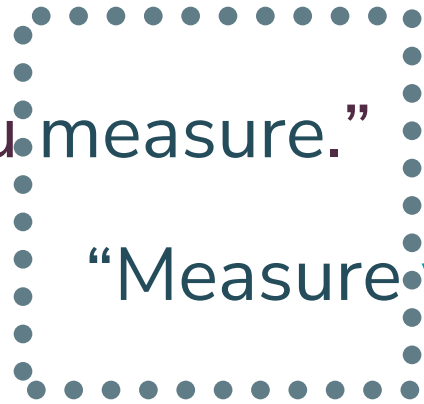
SUMMARY

Closing Thoughts



Manage what Matters

“You manage what you measure.”



“Measure what matters.”



Thank you to the team and our collaborators.

- Carolyn Verduzco
- Jason Biensch
- Kelan Deigh
- Nav Kiran
- Anna Halawa
- Liam Mostyn
- Sabrina Kinsella
- Taryn Turner
- Samantha Salter

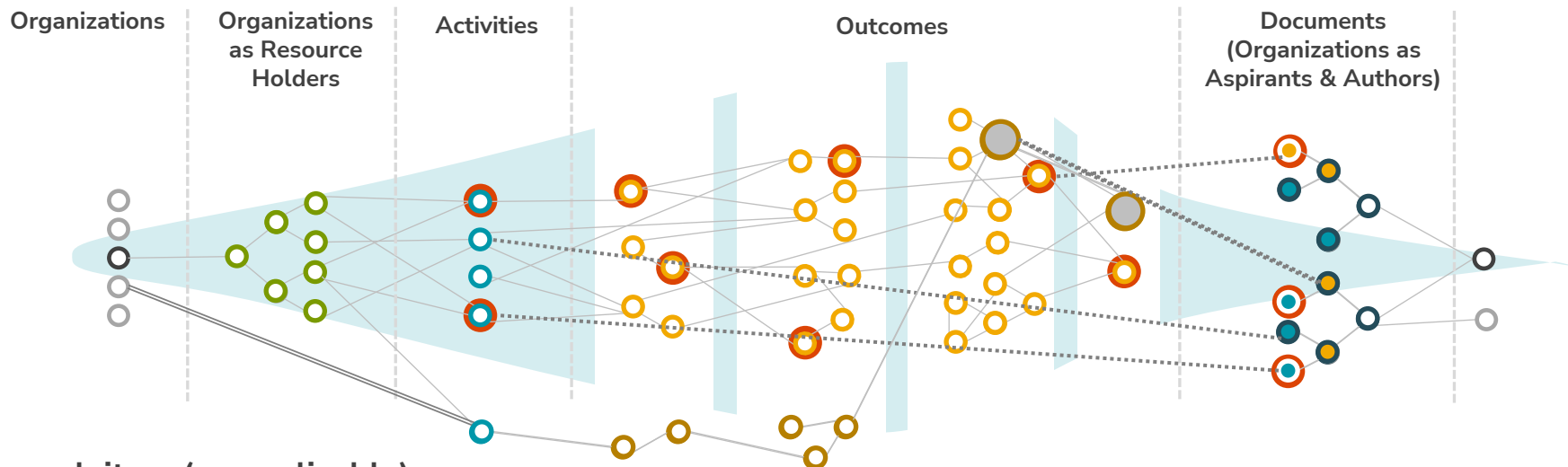


When you make a thing, a thing that is new, it is so complicated making it that it is bound to be ugly.

But those that make it after you, they don't have to worry about making it. And they can make it pretty, and so everybody can like it when others make it after you.

-Picasso

Thank you. Questions?



For each item (as applicable):

Measure/Indicator status:

- Measure / Indicator (Data / No Data)
- Target / Threshold
- No Data Expected

External Party integration:

- Organizational Delivery
- Funded External Delivery
- External Delivery
- Organizational Outcome
- Shared Outcome

Budget

- Increase (>2%)
- Reduction (>2%)
- No Change (< 2%)



Results: Status and change

- "Ideal"
- "Critical"
- Not "Ideal" or "Critical"
- None Identified

Strategy & Priority Alignment

- Desired Change
- Undesired Change
- No Change (<1%)



- Reconciliation
- Gender & Diversity
- Analysis
- Climate
- Quality of Life / Wellbeing
- External Framework(s)
- "Commitments & Aspirations of Gov't"
- Org (YG) Policy

