# Developing Key Performance Indicators Tool

This tool details the process of developing key performance indicators (KPIs) to help your organization track progress towards your strategic goals. The tool walks through the process of creating am aim statement to articulate your overall organizational goals, drafting KPIs and building out a KPI tree, and using plan-study-do-act (PDSA) cycles to make small incremental tests of change. The case study at the end of the tool provides a descriptive example of what using each of these tools looks like in action.

AIM STATEMENT → KEY PERFORMANCE INDICATORS → PDSA CYCLE
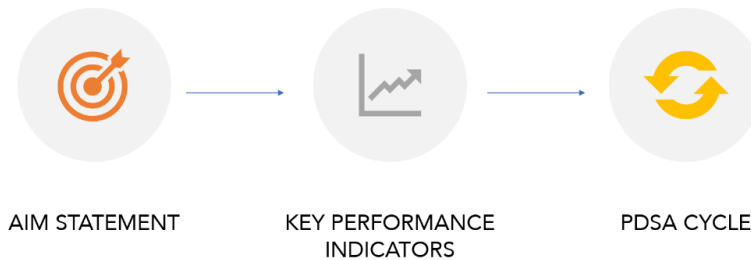
AIM STATEMENT

An aim statement is a clear, explicit summary of what you hope to achieve over a given time and the reason why that change is important. The aim statement guides your work by establishing what success looks like for your initiative. It states the areas in which the program will work toward the vision, but it does not list all activities that the program will engage. Your aim statement is the "north star" of your project, the overall vision that you can return to throughout the implementation of your work to ensure that you are on track to achieve your desired change.

AIM STATEMENT TEMPLATE:

We aim to (_WHAT ARE YOU TRYING TO ACCOMPLISH?_) because (WHY IT IS IMPORTANT?) with/for (WHO IS THE PRIORITY POPULATION YOUR PROGRAM SEEKS TO IMPACT?) by (WHAT IS THE TIME-FRAME FOR THE PROJECT?).

> _Example_: **_We aim to_** _increase the percentage of adolescents in our jurisdiction who receive an annual adolescent well-visit_ **_because_** _all adolescents deserve to be able to access critical preventative care regardless of their race or socioeconomic status. To do this, we will partner_ **_with_** _5 priority school districts who serve the target adolescent population to implement strategies_ **_by_** _the end of the 2023-24 school year._

Check out [this video](#) to learn more about drafting an aim statement.

Draft your **Aim Statement** in the table below:

Aim Statement
We aim to _____ because _____ with _____ by _____.

KEY PERFORMANCE INDICATORS & CRITICAL SUCCESS FACTORS

While Aim Statements can help you define what success looks like at a higher level, key performance indicators can help you track progress towards specific strategic goals.

Key performance indicators (KPIs) are qualifiable measures of performance over time for a specific objective. Typically, KPIs are tied to a larger strategic organizational goal. For example, if you work for your state's maternal and child health bureau and one for your strategic goals this year is to increase your coordination with your state's Medicaid office, a KPIs for this goal might be the number of Medicaid referrals coming into your agency. Just like there are process and outcome focused evaluations, there are also process oriented and results/outcome oriented KPIs.

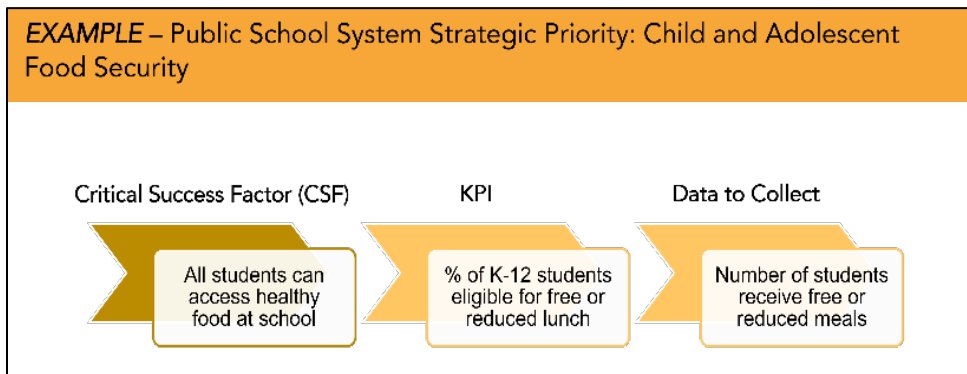A good KPI should be realistic, straightforward, and easy to measure. A KPI should be:
- *Aligned*: A KPI should be with the overall organizational strategy and outcomes. The overarching aims and goals should be what informs your KPIs.
- *Actionable*: Once you've set your KPI, you need to outline the steps you'll take to reach it and the metrics you'll measure along the way.
- *Realistic*: Start small. Big, lofty KPIs—while they might look good on paper—aren't doing you or your team any favors if they're unrealistic from the get-go.
- *Measurable*: When you set KPIs, ask yourself: What are you trying to achieve? What is the desired result? What's the timeline? Remember to add: How am I going to measure my KPIs?

Before you develop your KPIs, you will first want to identify your critical success factors. While a KPI measures your effectiveness at achieving a strategic goal, a **critical success factor (CSF)** is the *process* that you need in order to achieve your strategy. Critical success factors are the elements necessary for a strategy to be successful.

Critical success factors + Key performance indicators = Successful strategy
1. *CSF: Process/Elements needed to achieve goal/activity*
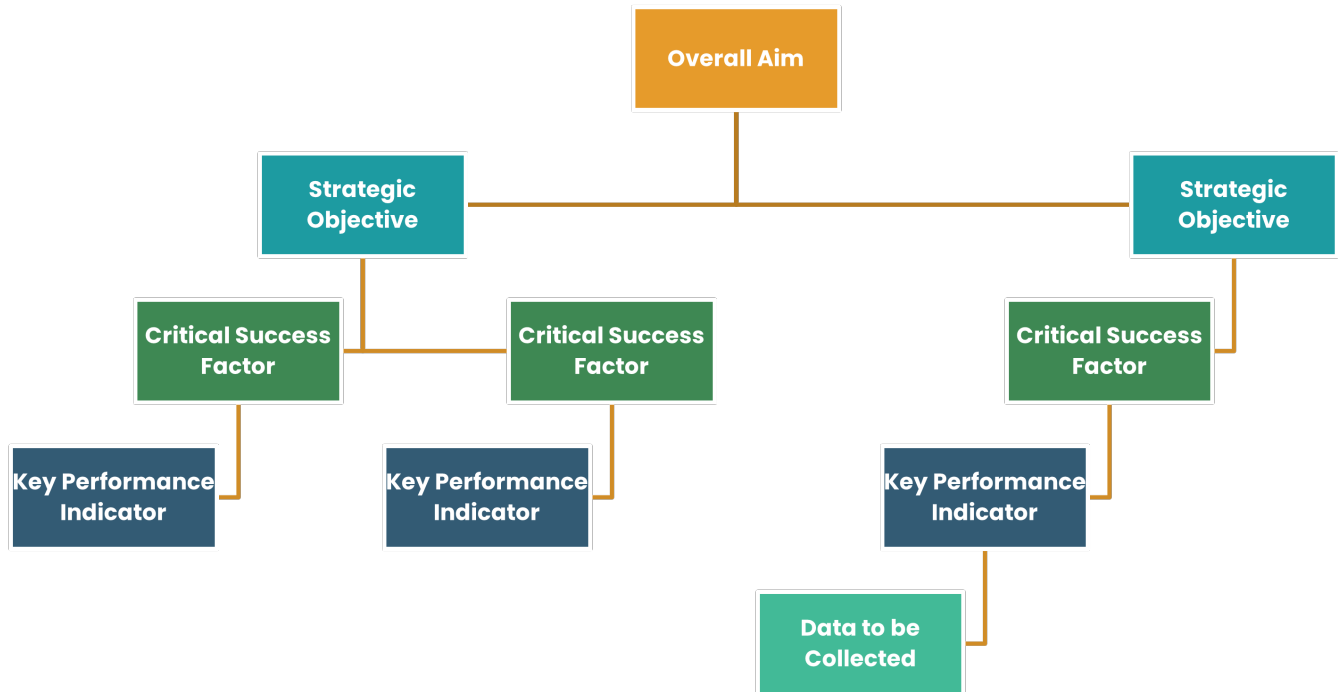2. *KPI: Measures if the CSF conditions are being met*

To help clarify the relationships between CSFs, KPIs, and data, check out the example below:

EXAMPLE – Public School System Strategic Priority: Child and Adolescent Food Security

Critical Success Factor (CSF)	KPI	Data to Collect
All students can access healthy food at school	% of K-12 students eligible for free or reduced lunch	Number of students receive free or reduced meals

Use the table below to draft your respective CSFs, KPIs, and any relevant data to be collected:

Critical Success Factor (CSF)	Key Performance Indicator (KPI)	Data to Collect

# KEY PERFORMANCE INDICATOR (KPI) TREE

A **KPI Tree** is a visualization method that allows an organization's objectives to be broken down into granular desired objectives and relevant CSFs and KPIs. This visualization method can display a range of measures in an organization or related to a project. They allow you to visualize complex relationships and interdependencies within an organization, as well as the relationship between key performance indicators and critical success factors.

You can use a KPI Tree to help your organization:
1. Breakdown objectives into granular outcomes and relevant KPIs or metrics
2. Visualize relationships, conflicts, and interdependencies within organizational structure.

A KPI Tree can be a helpful way to bring together your aim statement, critical success factors, KPIs, and any data that you will need to collect for each KPI.

Use the blank KPI tree template on the next page to map out the CSFs, KPIs, and data to collect that you brainstormed in the table in the previous section.
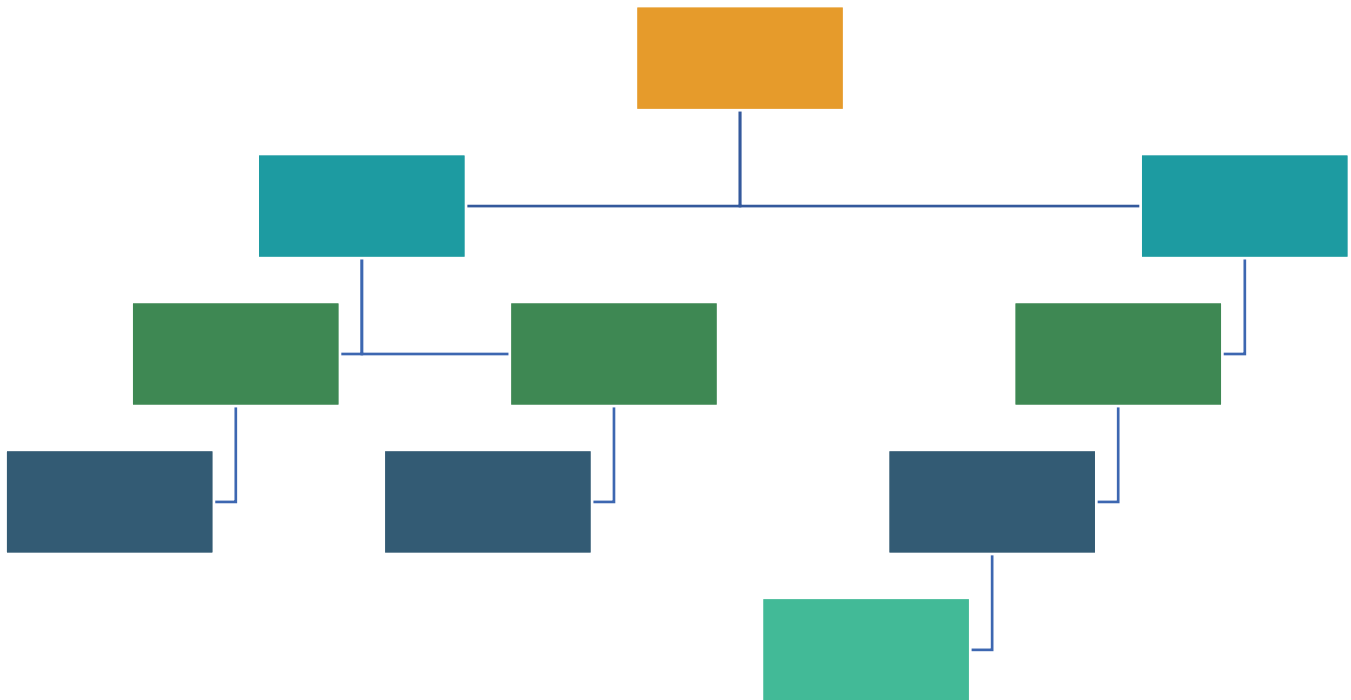
CASE STUDY: Postpartum Visits

The following case study services as a comprehensive example of what it looks like in practice to apply each of the three methods presented in this tool in practice.

CASE STUDY SCENARIO:

You are the Director of Programs at a doula service organization tasked with adding a new goal into the five-year strategic plan. The new goal was initially developed to address a concern on low attendance rates of postpartum visits reported by five partnered hospitals. The goal will focus on identifying how your organization and providers at five hospitals can leverage partnership to increase the number of postpartum visits attended by clients/new parents.
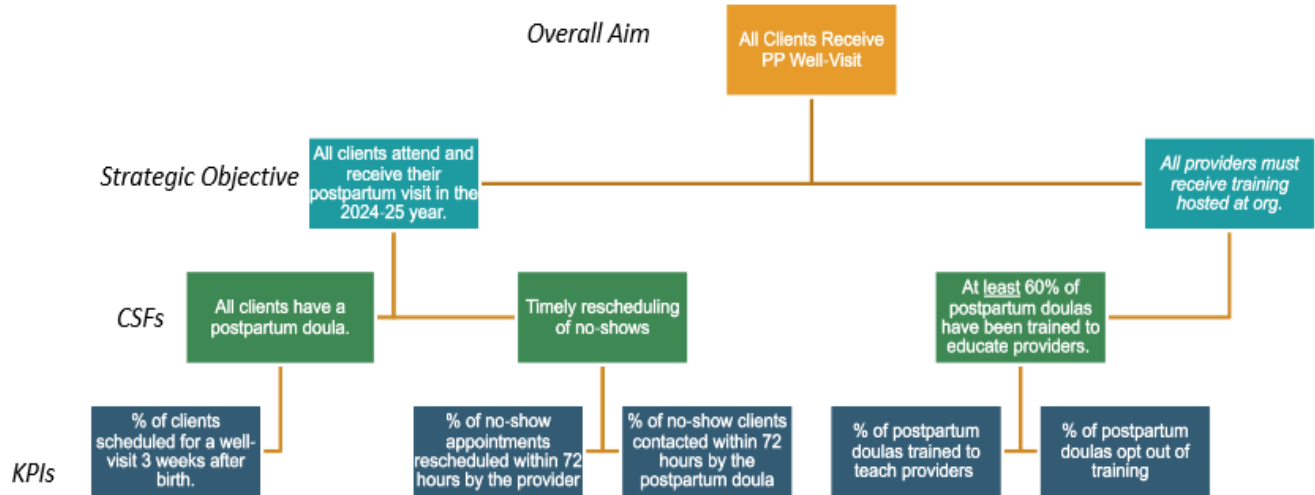
Your objectives will address how the organization plans to increase the number of postpartum visits clients attend in 2024-2025.

AIM STATEMENT:

- **We aim to** increase the percentage of clients receiving postpartum doula services **because** providers at five partnered hospital sites are reporting low numbers of attendance at

postpartum well-visits. To do this, we will collaborate **with** new parents, postpartum doulas, and providers at five partner hospitals and identify any barriers to care **by** the end of 2025.

KPI TREE:

Overall Aim — All Clients Receive PP Well-Visit

Strategic Objective — All clients attend and receive their postpartum visit in the 2024-25 year. | All providers must receive training hosted at org.

CSFs — All clients have a postpartum doula. | Timely rescheduling of no-shows | At least 60% of postpartum doulas have been trained to educate providers.

KPIs — % of clients scheduled for a well-visit 3 weeks after birth. | % of no-show appointments rescheduled within 72 hours by the provider | % of no-show clients contacted within 72 hours by the postpartum doula | % of postpartum doulas trained to teach providers | % of postpartum doulas opt out of training

Theory of Change:

What is a Theory of Change (TOC)?
- Comprehensive description and illustration of how and why a desired change is expected to happen in a particular context
- Charts out the work ahead, what success looks like and how to get there

Why is a TOC important for strategic planning?
- Basis for measurement, experimentation and learning
- Help teams test assumptions related to adapting and implementing strategies and clarify complicated pathways to change
- Helpful for mapping out complex systems change
- Serves as a compass, illuminating the desired goals, informing adaptations and identifying opportunities for meaningful measurement
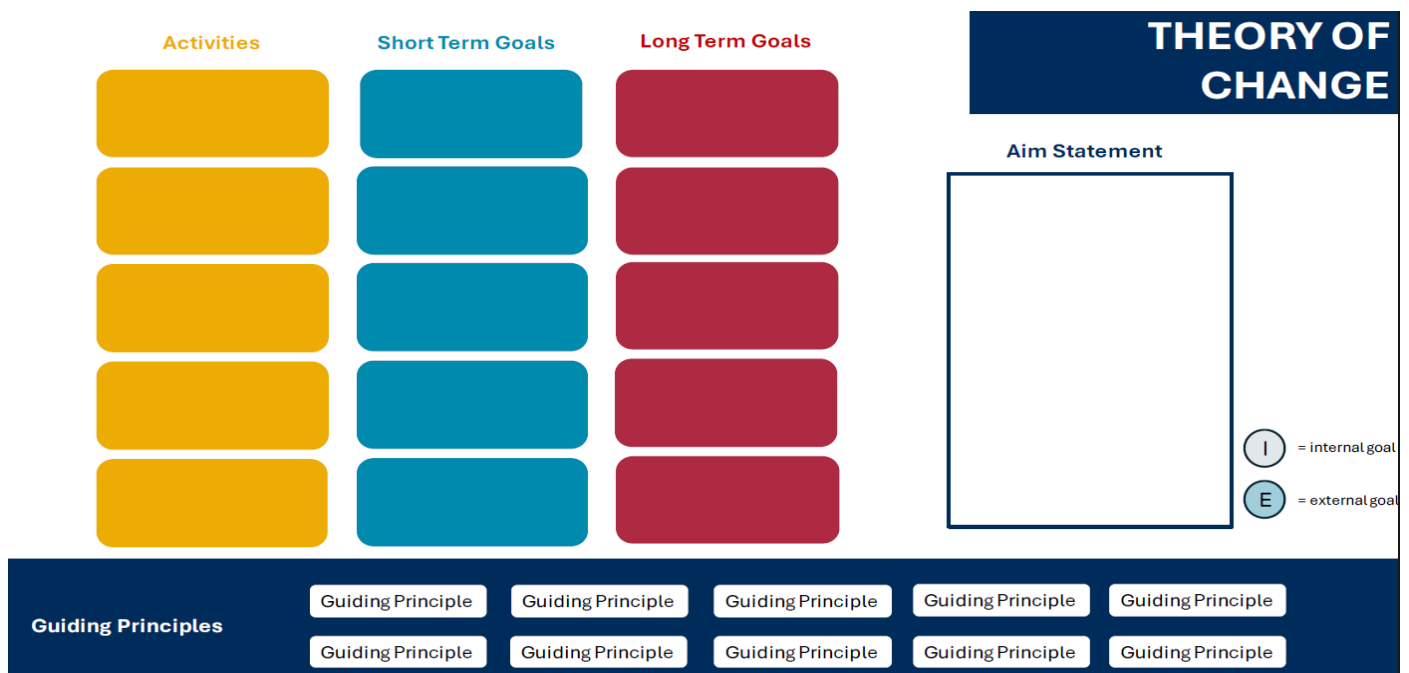
Common TOC Components:
- Aim Statement
- Goals/Impact
- Strategies/Activities
- Guiding Foundations/Principles
- Working Assumptions
- Outcomes (Short & Long term

Example TOC:
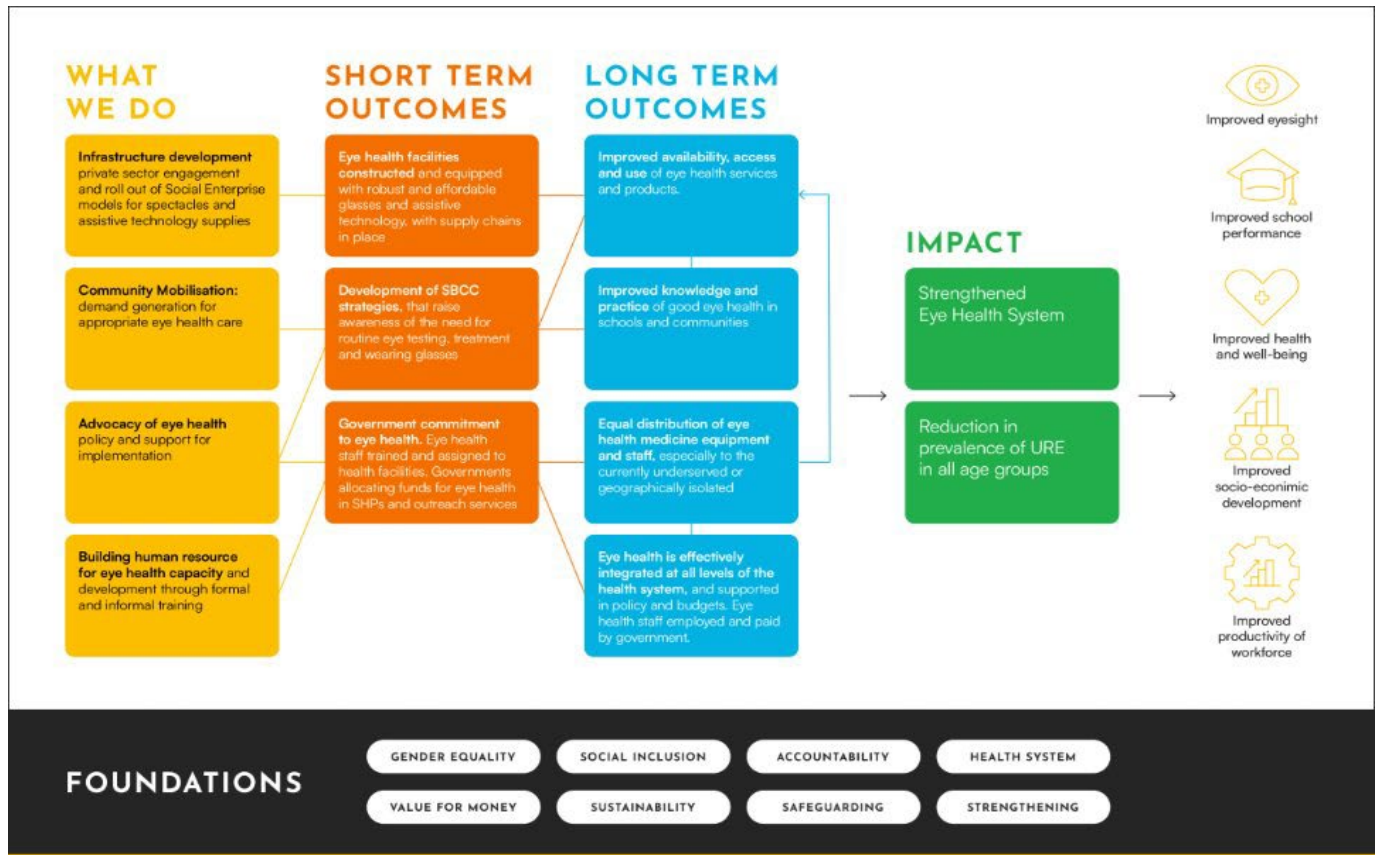
Blank Theory of Change:

ADDITIONAL RESOURCES

- **Key Performance Indicators:** https://www.klipfolio.com/resources/articles/what-is-a-key-performance-indicator
- **SisterWeb San Francisco Community Doula Network: Goal Scorecards** https://www.sisterweb.org/our-impact
- **AMCHP Future 2027 Implementation Plan**: https://amchp.org/wp-content/uploads/2022/12/AMCHP_ImplementationPlan_2022-2027.pdf
- **Santa Clara County Public Health Strategic Plan 2023–26:** https://publichealth.sccgov.org/about-us/strategic-plan-public-health-department