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CHALLENGES TO DEVELOPING NEW SOCIOECONOMIC PERFORMANCE MEASURES

CASSANDRA MOSELEY, EMILY JANE DAVIS, AND MICHELLE MEDLEY-DANIEL

The USDA Forest Service needs performance measures to track the social and economic outcomes of its investments. But there are inherent challenges to developing, adapting, and using new measures in the Forest Service's accountability system. Measuring socioeconomic outcomes can also be complex. We describe these barriers and suggest possible solutions for developing and integrating new socioeconomic performance measures (see Table 1, reverse).

Challenges associated with adopting new measures

All nationally reported performance measures need to have consistent business rules, definitions, systems of record, and data collection and calculation systems in place. Depending on the particulars of the measure, this requires some level of new investment in data collection and reporting. Staff members may be hesitant to create additional reporting requirements and potentially detract from land management planning and implementation. Further, after many years of investment in the Forest Service's work planning and performance reporting infrastructure, there are limited resources available for major upgrades.

Challenges associated with the nature of socioeconomic measures

Relative to land management, the Forest Service has limited (but growing) expertise in the social and economic dimensions of watershed restoration. In addition, some socioeconomic measures and measurement strategies most commonly recommended in the monitoring guidebooks we reviewed would require significant investment

in new data collection and reporting systems if converted into agency performance measures. The agency could also face challenges in protecting the privacy of businesses and citizens.

Possible solutions

All of these challenges are surmountable by taking a phased approach that allows for the adoption of a small number of relatively easy, straightforward measures now, and the development of more integrated measures over time. Focusing on performance measures and methods involving data that the Forest Service already collects, and scorecards with minimal data-collection requirements can limit the need for investment in approval processes and data systems, and avoid breaching the privacy of businesses and citizens.

For additional information, see Moseley, C., and E.J. Davis. 2012. *Developing socioeconomic performance measures for the Watershed Condition Framework*. Ecosystem Workforce Program Working Paper 36. University of Oregon. ewp.uoregon.edu/publications/working



UNIVERSITY OF OREGON

INSTITUTE FOR A SUSTAINABLE ENVIRONMENT

5247 University of Oregon

Eugene OR 97403-5247

T 541-346-4545 F 541-346-2040

ewp@uoregon.edu • ewp.uoregon.edu

Table 1 Barriers and strategies associated with performance-measure development

| Potential barrier or challenge | Potential strategy for overcoming barrier or challenge |
|---|---|
| Challenges associated with adopting new resources | |
| Hard targets may not capture diversity and nuance of socioeconomic impacts; hard targets can be difficult to adopt | <ul style="list-style-type: none"> Adopt a mix of soft and hard targets |
| Soft targets may not change field-level behavior because they do not hold line officers accountable; however they may be easier to adopt | <ul style="list-style-type: none"> Adopt a mix of soft and hard targets |
| Targets can have unintended consequences and accidentally drive the wrong behavior | <ul style="list-style-type: none"> Test measures and targets, and develop adaptive system to revise targets as problems emerge |
| New performance measures may add to the burden of field staff members, who already spend a lot of time on reporting | <ul style="list-style-type: none"> Focus on measures that require limited new data collection or where data collection is relatively easy |
| Recently, the Forest Service has been trying to reduce the number of performance measures it has, especially in areas where agency has limited expertise | <ul style="list-style-type: none"> Add a small number of new measures |
| Some information that folks want on the ground does not translate well to measures that can be collected across the country | <ul style="list-style-type: none"> Pick a few measures with national appeal; encourage regions to innovate with their own measures |
| Lack of business rules can create unclear data and meaning | <ul style="list-style-type: none"> Draw lessons from Fire and Aviation Management's recent efforts to improve business rule |
| Measures that do not fit clearly into established authorities, strategic plans, or programs are less likely to be adopted | <ul style="list-style-type: none"> Look for synergy between proposed measures and existing authorities, plans, and programs |
| Challenges associated with the nature of socioeconomic performance measures | |
| NFS staff not experienced with socioeconomic measures; kinds of socioeconomic data that the agency collects not well known | <ul style="list-style-type: none"> Convene diverse team from R&D, AQM, Civil Rights, Partnership Office, as well as relevant NFS staff to participate in measurement development |
| Internal resistance to adding more performance measures—e.g.: <ul style="list-style-type: none"> "It is not our job to care about social or economic outcomes" "We do not control socioeconomic conditions near our national forests and grasslands, so why should we be held accountable?" | <ul style="list-style-type: none"> Clearly communicate the purpose of new measures and how they will be used Adopt measures that reflect what the agency does control or can influence rather than measures of general condition |
| Some kinds of data collection would require OMB Paperwork Reduction Act clearance | <ul style="list-style-type: none"> Identify opportunities to use data already collected Request OMB clearance for a few clear measures Use self-assessment or professional judgment to have management units select status from list of options on a scorecard (e.g., level of collaborative involvement, levels of integration, etc.) |
| Contractors may not want to share information about their business practices | <ul style="list-style-type: none"> Develop systems that respect privacy of businesses and citizens |
| Modeling jobs retention and creation from restoration contracts such as TREAT provides one window into job creation potential of restoration, but currently these models have not yet been tested, making their accuracy uncertain | <ul style="list-style-type: none"> Develop strategies to gather empirical information about actual jobs Invest in research to downscale IMPLAN models Communicate the limits of model-based approaches |
| Adapting new performance measures will likely require further integration of data across deputy areas, especially between business operations and the NFS | <ul style="list-style-type: none"> Continue to increase integration in WORKPLAN and PAC and plan for new business rule development and programming, even for those measures that use existing data |

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