

# Practical Implementation Tips

## Assessment Planning

### Align the Assessment Approach with Selected Outcomes

| Outcome  | Key Activities  | Other Considerations  |
|--|---|---|
| <p><b>Detailed Action Plan</b></p> <p>Establish a prioritized improvement action plan, with clear responsibilities and anticipated timelines for action.</p> | <ul style="list-style-type: none"> <li>• Benchmarking and Improvement Selection</li> <li>• Assessment Summary</li> <li>• Improvement Evaluation</li> <li>• Action Planning</li> </ul> | <ul style="list-style-type: none"> <li>• Maximize likelihood of post-assessment action by involving executive management and other key stakeholders in assessment summary and closeout meetings.</li> <li>• Engage assessment participants who can take ownership of actions in the plan and make sure they understand this expectation.</li> <li>• Create a “parking lot” of actions that can’t yet be resourced so that they don’t get lost.</li> </ul> |
| <p><b>General Action Plan</b></p> <p>Establish a prioritized improvement action plan, without delegating responsibilities and timelines for action.</p>      | <ul style="list-style-type: none"> <li>• Benchmarking and Improvement Selection</li> <li>• Assessment Summary</li> <li>• Action Planning</li> </ul>                                   | <ul style="list-style-type: none"> <li>• Target participants with decision-authority within specific program or technical areas, who may independently pursue low-hanging fruit or other identified improvement opportunities.</li> </ul>   |
| <p><b>Detailed Improvement List</b></p> <p>Identify and evaluate specific improvement activities to produce a detailed list of needs.</p>                    | <ul style="list-style-type: none"> <li>• Benchmarking and Improvement Selection</li> <li>• Assessment Summary</li> <li>• Improvement Evaluation</li> </ul>                            | <ul style="list-style-type: none"> <li>• Target subject matter experts, system owners, and working staff or first line management in the selected area.</li> <li>• Be sure participants understand that they are expected to act on improvement recommendations within their areas of responsibility</li> </ul>   |
| <p><b>Gap Analysis</b></p> <p>Identify and summarize general gap areas and potential improvement actions.</p>  | <ul style="list-style-type: none"> <li>• Benchmarking and Improvement Selection</li> <li>• Assessment Summary</li> </ul>  | <ul style="list-style-type: none"> <li>• Ensure participants’ expectations are managed – this will be a high-level, awareness building exercise with limited subsequent action anticipated.</li> </ul>  |

# *Practical Implementation Tips*

## **Assessment Planning**

---

### **Other Assessment Streamlining and Scheduling Considerations**

- **Plan for a weekly meeting cadence** – longer gaps between assessment activities can create disruptions in the process and lead to assessment participants forgetting previous assessment discussions and context.
- **Break up (or skip) offline, individual benchmarking assessments** – individual assessments require 4-8 hours to complete if all of the assessment elements are included. Consider asking participants to complete one area of the assessment each week (immediately prior to planned group discussions) or skipping individual assessments, proceeding directly to group benchmarking discussions.

### **Supplemental Kickoff Meeting Resources**

- **TAM Data Assistant Tutorial Videos** – these are short instructional videos that walk through how to navigate basic functions of the assessment tool:
  - New User Registration and Group Assessment Participation
  - Benchmarking and Improvement Selection
  - Evaluating Selected Improvements
  - Reviewing Your Group Assessment Results
- **TAM Data Assessment Kickoff Meeting Presentation Template** – this is a PowerPoint template that can be customized to:
  - Introduce the assessment methodology and tools
  - Explain agency-specific context, motivation, and targeted elements
  - Set assessment timelines and next steps
  - Share links to web-based assessment resources

# *Practical Implementation Tips*

## **Assessment Planning**

---

### **Subject Matter Expert Involvement in Assessment Kickoff**

Line up and work with subject matter experts (SMEs) to:

- **Provide a general overview of the targeted business areas** and related processes, systems, and data.
- **Create supporting presentation materials** to replace placeholder slides in the kickoff presentation template.
- **Address participant questions** during the assessment kickoff meeting.