

Activity 4.3: Monitoring Progress — Student Instructions

Small Business Senior Leader Roles and Responsibilities

As a Small Business Senior Leader you must ensure that your office is making progress in meeting your objectives. Once you identify what you need to do to meet your objectives, you also must identify how you are going to consistently assess whether satisfactory progress is being made to that end.

Purpose:

Based on your analysis of the current situation in your office and your plan to address the identified short term and long term priorities, determine how you will monitor progress in achieving your objectives.

Background:

You now have to live with the results of your analysis of your current office situation and its constraints (Activity 4.1). Given your priorities and objectives, you will need to monitor your progress in meeting these revised program objectives. Tools are available to track progress toward your small business program goals, but you also need to identify other methods to monitor progress in day-to-day operations, inreach, outreach, training, etc., and make mid-course corrections as needed. This is an opportunity to identify what you would do to monitor progress and maintain accountability in this situation. You'll share these methods with your team and come to consensus on a set of priorities, objectives, and methods for monitoring progress and maintaining accountability.

Instructions:

1. Individually:
 - a. Review the short term and long term priorities, preliminary objectives, and the teams solutions to address them.
 - b. Identify what you believe should be monitored and methods you would use to collect information. Include any methods you currently employ to monitor progress that you believe are applicable to this scenario.
2. With your team:
 - a. Discuss suggested monitoring methods and tools.
 - b. Link methods to priorities and objectives by examining the data each method and tool collects to ensure that a relationship exists between the measure and its target. Also consider how that data might provide information about other priorities and objectives.
 - c. Select methods or tools from those suggested that provide the most useful and relevant information for monitoring, and identify what you will do to ensure that you and your office remains accountable.
 - d. Point out methods and tools, if any, representing new ideas and promising techniques that have not been used before.
 - e. Discuss how to apply the Oz Principle or the structure for establishing accountability.
 - f. Be prepared to share your ideas during the discussion that follows.