AmeriCorps State and National
FY24 Notice of Funding Opportunity Technical Assistance

Best Practices in Performance Measure Design: Live!

09/28/23

AmeriCorps

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Hi everyone, and welcome to Best Practices in Performance Measure Design: Live! I'm Sarah Foster, the AmeriCorps State and National Program Impact Specialist, and I will be leading the session today. I'm here with my colleagues who you may have seen in other technical assistance sessions: Colleen Holohan and John Paul Snead, our training team.

Session Outline

- Questions about the content of the recorded Best Practices in Performance Measures session
- Enter Performance Measures in eGrants
- Questions
- Resources

Today's call has three parts to it. First, we're going to set aside some time to answer any questions you may have after viewing the Best Practices in Performance Measure Design recorded webinar.

Next, I will walk through entering the performance measure designed in the recorded session into the eGrants Performance Measure Module.

We'll take time for more questions about performance measures or entering your information in eGrants.

Lastly, we'll provide you with some helpful performance measurement resources.

Questions

So before we get started today: the Best Practices of Performance Measure Design recorded session was posted last week on the NOFO competition page. Today's session is a continuation of the content in the recorded session. Do you have any questions about the content in that presentation before we dive into new content?

Great! Let's get started.

EduCorps: Recap

The EduCorps Program is requesting twelve three-quarter-time AmeriCorps members to lead one-on-one and small group tutoring programs for middle-school students at a high-poverty school. The primary goal of the program is to improve students' achievement levels in mathematics and to help students stay on track for high-school graduation. Members will meet with groups of 1-3 students after school each day for about an hour each, using mathematics enrichment materials that complement the normal classroom curriculum. Members will also lead daily large group activities focused on physical activity and healthy eating so that middle school students make better health choices.

- One aligned performance measure connected to the primary intervention
  - Primary intervention: tutoring
  - Aligned PM: ED1A + ED5A
- Objectives
  - 12 TQT members = 8.4 MSY
  - Education – K-12 Success: 6.3 MSY and 12 members
  - Healthy Futures – Obesity & Food: 2.1 MSY and 12 members
- Target Beneficiaries
  - ED1A: 180 individuals
  - ED5A: 126 students

In the recorded session, we left off at Step Five: Enter performance measures into eGrants. So before we get to that, I'm going to recap the performance measure we designed from the recorded session.

So to our simplified program: The EduCorps Program is requesting twelve three-quarter-time AmeriCorps members to lead one-on-one and small group tutoring programs for middle-school students at a high-poverty school. The primary goal of the program is to improve students' achievement levels in mathematics and to help students stay on track for high-school graduation. Members will meet with groups of 1-3 students after school each day for about an hour each, using mathematics enrichment materials that complement the normal classroom curriculum. Members will also lead daily large group activities focused on physical activity and healthy eating so that middle school students make better health choices.

Even though EduCorps members are performing multiple activities for middle school students, they decided that their primary intervention is tutoring since their primary goal is improving student's achievement levels in mathematics. After looking through the Performance Measure Instructions, EduCorps found that the National Performance Measure output ED1A – Number of individuals served – and outcome ED5A – Number of students with improved academic performance – were a good match for the EduCorps

theory of change, logic model, and program design.

They calculated the MSY and members that would be dedicated to each objective that their entire program is working toward. Based on the performance measure instructions, the tutoring activities fall under the K-12 objective, and the physical activity and healthy eating activities fall under the Obesity & Food objective. Based on their program design, all twelve of their members perform activities in both objectives, but they spend 75% of their time tutoring and 25% of their time leading the physical activity and healthy eating activities. Therefore, they calculate, of their total project's 8.4 MSY, that 6.3 MSY are dedicated to K-12 Success and 2.1 MSY are dedicated to Obesity & Food.

They also decided on their target beneficiaries. EduCorps' output target, or the number of individuals their AmeriCorps members hope to tutor, is 180. They also think that 70% of those students, or 126 students, will meet their definition of improved academic performance.

Enter Performance Measure Module
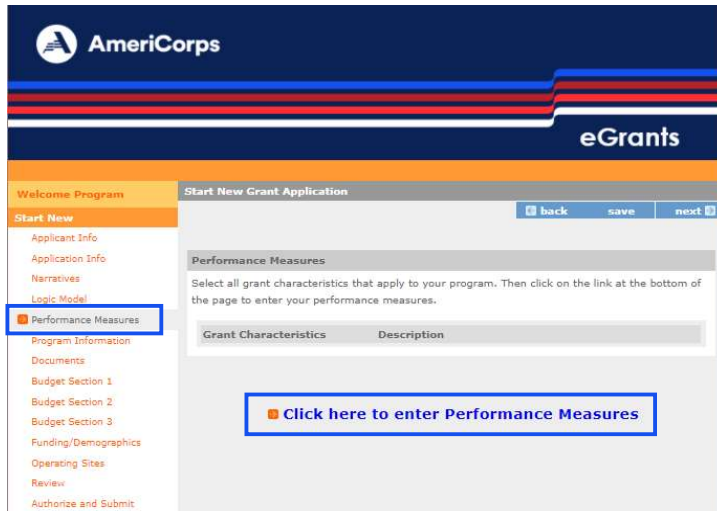
- Enter Performance Measure information in the eGrants Performance Measure Module
- The Application Instructions explain how to enter information

So now EduCorps is in eGrants and they need to enter the information they've decided on into the Performance Measure Module. Every aspect of the performance measure design we walked through, from selecting specific outputs and outcomes to the instruments they will use to collect data, is entered into the Module.

While the Application Instructions explain how to enter information into eGrants, we will walk through it here so that you can see how the system looks before you enter it yourself.

To get to the Performance Measure Module, click on the Performance Measures link in the left-hand menu. Then click on the link that says "Click here to enter Performance Measures" to enter the module.

You will enter the Performance Measure Module and be placed on the Home Page. Note the tabs across the top: The tab that you are on is highlighted in pink. Also, note that the other tabs of the module are greyed out. As we walk through the module, you will see that most of the information in the Performance Measure Module is based on information entered in previous tabs. Therefore, the system doesn't allow you to skip ahead in the Performance Measure Module.

To start the process of creating a new performance measure, click the Begin button.

Performance Measure Module: Objective Tab

Select the focus area connected to your primary service activity

This will take you to the Objective tab, as you can tell from the tab's pink font.On the Objective tab, you need to enter objective and intervention information about your entire project. Click on the arrow next to the focus area to display all of the objectives that fall under the focus area.

EduCorps' member's service falls under the Education and Healthy Futures focus areas. Since their primary intervention is under the Education focus area, they're going to click on the arrow next to Education

Performance Measure Module: Objective Tab

Select the objective connected to your primary service activity

To see all of the objectives as listed in the Performance Measure Instructions. Click the arrow next to the objective to see the interventions that are associated with your chosen objective.

EduCorps' activities fall under the K-12 Success objective. So now they'll click on the arrow next to K-12 Success

Performance Measure Module: Objective Tab
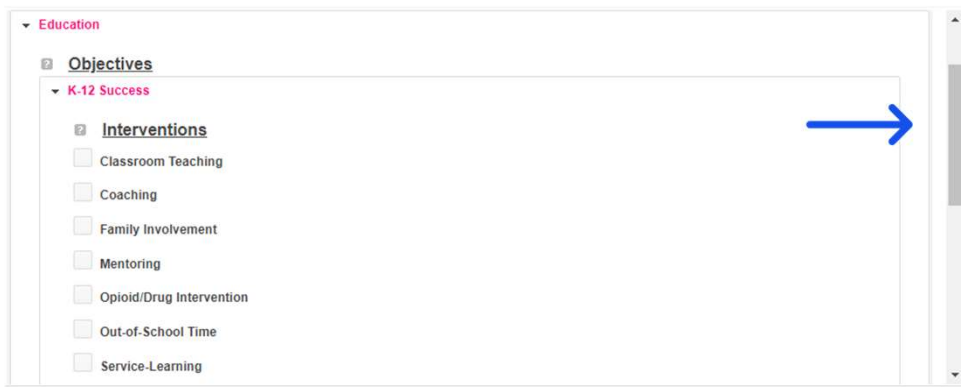
Check the box next to your primary service activity. Use the scroll bar if necessary

To see the list of interventions that are associated with the selected objective as shown in the Performance Measure Instructions.

Some objectives, like K-12 success, have a lot of interventions listed under their objective. If you don't see the objective you're looking for, use the scroll bar to see all the options.

Performance Measure Module: Objective Tab

Classroom Teaching

Coaching

Family Involvement

Mentoring

Opioid/Drug Intervention

Out-of-School Time

Service-Learning

Summer Learning

Tutoring

Other Classroom Support

Other

Check the box next to your primary service activity

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You will put a checkbox next to your selected intervention.

For EduCorps, they see tutoring, so they put a check next to it:

Great! Now EduCorps will go through the same process with Healthy Futures.

Remember: Members and MSY have to be allocated to all of your project's objectives, so you need to fill out the information at the objective level on the Objective tab. Otherwise there will be issues in later screens!

So EduCorps will complete the same exercise for the other part of their program: physical activities and nutrition/food support. They can see the Objectives under Healthy Futures. They expand Obesity and Food
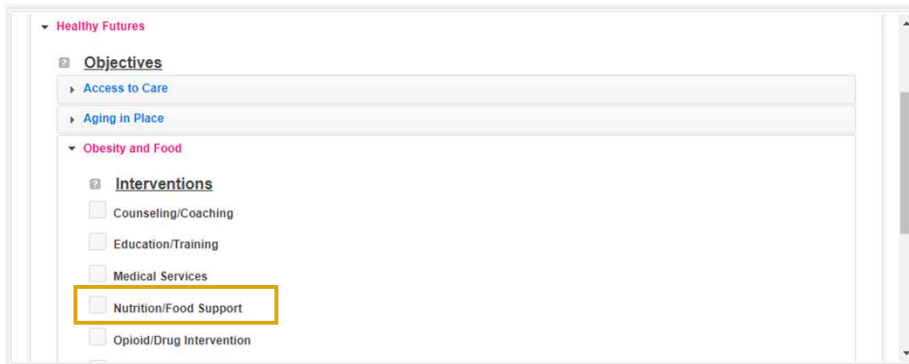
To see the possible interventions.

Nutrition/Food Support is visible here, but EduCorps needs to scroll down

Performance Measure Module: Objective tab

Obesity and Food

☑ **Interventions**

☐ Counseling/Coaching

☐ Education/Training

☐ Medical Services

☐ Nutrition/Food Support

☐ Opioid/Drug Intervention

☐ Outreach

☐ Physical Activities

☐ Referrals

☐ Other

It is possible to check more than one service activity under the same objective

To also see Physical Activities. You have the ability to select multiple interventions under one objective. Check the boxes next to the appropriate interventions.

EduCorps selects both Nutrition/Food Support and Physical Activities.

Performance Measure Module: Objective Tab

Once you've selected all your service activities, you'll need to state which is the Primary Focus Area and Service Activity.

Performance Measure Module: Objective Tab

At the bottom of the Objective tab, there are dropdowns where you select your primary focus area and intervention. You **must** select a primary focus area and intervention, and you have the option to add in a secondary focus area if you so choose.

Performance Measure Module: Objective Tab

Selecting your primary focus area and primary intervention is key because your aligned performance measure is connected to the primary intervention.

So let's see how this works for EduCorps:

They only have the options Education and Healthy Futures available to them because those are the only focus areas that their program's service activities fall under. Since EduCorps' primary intervention is tutoring, they select Education as the Primary Focus Area.

Next, EduCorps has to select the Primary Intervention. The only option available is K-12 Success: Tutoring because tutoring is the only intervention they selected previously. And that's great, because it is EduCorps' Primary Intervention.

If EduCorps wanted to select Healthy Futures as a Secondary Focus Area, they could. They would have to decide which of the two interventions they selected previously, Physical Activities and Nutrition/Food Support, is their Secondary Intervention. That decision would be based on their program design – just like AmeriCorps does not define "primary," AmeriCorps also does not define "secondary."

Performance Measure Module: Objective Tab

Since EduCorps doesn't have to select a secondary focus area, they are going to just select Education as their primary focus area and Tutoring as the primary intervention. EduCorps knows that the performance measure they create later in the module will be connected to the primary intervention as stated on the Objectives tab. They are on their way to meet AmeriCorps' requirement to have one aligned performance measure connected to their primary intervention.

Because they're good with this tab, they can move to the next tab by clicking Next.

Put It Together: MSY/Members Tab

This will take us to the MSY/Members tab. The information you enter in this tab is still at the larger project level.

You can confirm that the Summary reflects your program. This information followed us from the Objective tab.

The first data point you'll enter is the Total MSYs for the project under the resource allocation section. Your total MSY also appears in your budget. Make sure that this value **matches** the MSY in your **total grant budget**; otherwise you will get an error when you try to validate your application later.

EduCorps' project as a whole has a total of 12 three quarter time members, which is a total of

Put It Together: MSY/Members Tab

Enter the MSY and members connected to each objective

8.4 MSY.

Next, enter the MSY and members allocated to each objective for your program.

Put It Together: MSY/Members Tab

Resource Allocation					
* Enter Total MSYs for the project:	8.40				

Focus Area	Objective		MSY	% of total MSY	Members
Education	K-12 Success	*	6.30	75.00	* 12
		Sub Total:	6.30	75.00	12
Healthy Futures	Obesity and Food	*	2.10	25.00	* 12
		Sub Total:	2.10	25.00	12

So based on the math we did previously, they enter the 6.3 MSY and 12 members in K-12 Success and 2.1 MSY and 12 members in Obesity & Food. Remember: members can be double-counted across multiple objectives, but MSY cannot.

Something to note: eGrants calculates how many MSY you've allocated to each objective compared to the total MSYs for the project and automatically populates the percent of total MSY column. You must allocate 100% of your MSY in the objectives. If you do not, you'll receive an error on this page when you try to move on.

Put It Together: MSY/Members Tab

If we use our scrollbar, we can see that there is a grand total row which confirms that 100% of our MSY have been allocated to the project. Wonderful! When the grand total of the percentage of total MSY is 100%, click Next to take you to the next tab.

Put It Together: Performance Measure Tab

Now after all this time, you're actually going to enter the information for your performance measure in the performance measure module! A few things to note on the Performance Measure tab.

First: at the very top there is a Summary of Performance Measures. This populates as you add information into this tab.

Second: in the bottom left corner, there's a Save button. The Save button is actually on all of the tabs. It's a good idea to save your work as you go.

Third: there's a third button now in the bottom right corner – Delete PM in Progress. Hopefully you won't have to use this button because you've already planned out your performance measures before you got to the eGrants module. But it is available in case you need to use it.

Finally: Since we haven't entered any information into the Performance Measures section yet, you'll see a lot of No records found entries. These fields will change as we enter information into the module.

Put It Together: Performance Measure Tab

Performance Measures

* Objective — --Select Objective--
--Select Objective--
K-12 Success
Obesity and Food

* Title

* Problem Statement

* Selected Interventions
No records found.

* Outputs
No records found.

Select the objective connected to your primary service activity

So we're going to dive into the Performance Measures section of this screen.

To meet AmeriCorps' performance measure requirements, you need to create an aligned performance measure connected to your primary intervention. So that's the first performance measure you should make to ensure you meet your requirements.

EduCorps is going to enter the information needed to get to their aligned measure: output ED1A and outcome ED5A.

The first thing you'll need to do is select the objective for which you're making the performance measure.

Once again, the only options available are based on the information EduCorps selected from the Objectives tab. Tutoring falls under the K-12 Success objective, so EduCorps is going to select that option.

Put It Together: Performance Measure Tab

Performance Measures

* Objective	?	K-12 Success ▾
* Title		Helping Students Improve in Math
* Problem Statement		Example problem statement.
* Selected Interventions	?	▾ K-12 Success
		☐ Tutoring
* Outputs	?	▾ K-12 Success
		☐ ED1A: Number of individuals served

Enter a logical title for the performance measure. Enter a brief description of the community problem/need connected to the performance measure.

Next, you need to enter a logical title for the performance measure. It is completely up to you to decide on the title.

Since EduCorps' goal is to improve students achievement in math, they enter Helping Students Improve in Math, which is a pretty logical title.

Next you'll enter a brief description of the problem or need being addressed by the service activities captured under **this performance measure** in the Problem Statement field. You can summarize this from the information in your application.

Put It Together: Performance Measure Tab

Select the primary intervention and any other intervention(s) connected to the performance measure

Next, you'll need to select the primary intervention you identified, plus any other interventions that also contribute to this performance measure.

Now wait, EduCorps didn't enter this information… or did they? This is the intervention that they selected back on the Objective screen under K-12 Success. It appeared here when they selected the K-12 Success objective on the Performance Measure page.

Put It Together: Performance Measure Tab

Select the appropriate performance measure output

Next you'll select the output of the aligned performance measure you've created. The outputs also populate based on the objective selected above.

EduCorps' performance measure output is ED1A, so they put the checkbox next to

Put It Together: Performance Measure Tab

ED1A: Number of individuals served.

You may wonder what the empty box and checkbox are below ED1A. If you were to create an applicant-determined performance measure under the K-12 objective, you would check the box and enter the output for your applicant-determined measure. Since EduCorps is using the National Performance Measure, they ignore it.

You'll also see that there is a value under the Outcomes. Since EduCorps selected ED1A in the Outputs section, all of the National Performance Measure outcomes aligned with ED1A (per the Performance Measure Instructions) are now populated in the Outcomes section.

Put It Together: Performance Measure Tab

* Outcomes ▼ K-12 Success	Select the appropriate performance measure outcome

ED10: Number of students enrolling in post-secondary education/training

ED27C: Number of students with improved academic engagement or social-emotional skills

ED5A: Number of students with improved academic performance

ED6: Number of students with increased attendance

ED7A: Number of students with decreased disciplinary incidents

ED9: Number of students graduating from high school on time

Add User Outcome

In the Outcomes section, you will select the performance measure outcome you chose when designing your measure. Some program designs may pair more than one outcome measure with the output. This is fine **as long as** all outcomes measure significant accomplishments from the activities captured by this performance measure. There's an FAQ about choosing multiple outcome measures in Appendix C of the Performance Measure Instructions.

EduCorps decided that ED5A would be their outcome aligned with ED1A. The checkboxes may appear a little wonky – so they are sure to put a check in the third box

Put It Together: Performance Measure Tab

since ED5A is the third entry in the table.

Now we can see that EduCorps has selected their aligned output and outcome pairing! Great!

Put It Together: Performance Measure Tab

Enter the number of MSYs and members connected to the performance measure

The final pieces of information to add at the bottom of the Performance Measure tab are the MSYs and members that contribute to this performance measure.

All of EduCorps' members and MSY dedicated to the K-12 objective are also dedicated to this specific performance measure. Therefore, EduCorps will enter

Put It Together: Performance Measure Tab

ED10: Number of students enrolling in post-secondary education/training

ED27C: Number of students with improved academic engagement or social-emotional skills

✓ ED5A: Number of students with improved academic performance

ED6: Number of students with increased attendance

ED7A: Number of students with decreased disciplinary incidents

ED9: Number of students graduating from high school on time

Add User Outcome

* Enter # of MSYs   * Enter # of Members

6.3   12

6.3 MSYs and 12 Members.

Remember that **performance measures do not** need to capture 100% of a program's MSY or members, so the additional 2.1 MSY in the Obesity & Food objective **are not** included in this performance measure.

After you've entered the MSY and Members, click Next to get to the Data Collection tab.

Put It Together: Data Collection Tab

Summarize the service activity (or activities) connected to the performance measure

On the Data Collection tab, you will enter details about how your output and outcome are measured. But before you get to that, you need to enter a brief description of the service activity or activities captured under this performance measure. This content can also be summarized from your grant application.

Put It Together: Data Collection Tab

EduCorps enters the information from their description: members will lead one-on-one and small group tutoring programs to middle school students at a high-poverty school. Members will meet with groups of 1 to 3 students after school each day for about an hour each, using mathematics enrichment materials that complement the normal classroom curriculum.

Next, you'll enter information about the data collection instruments for your selected output and outcome. This is also an opportunity to confirm that you selected the correct output and outcomes from the Performance Measure tab. To start the process, click the arrow to expand the output measure

Put It Together: Data Collection Tab

Enter the method, instrument description, and target number for the selected output

In this section, you will need to select the data collection method, then enter the instrument description, and target number for your output.

Put It Together: Data Collection Tab

The method for measuring your output is pre-populated with the option that is mentioned under how to measure/collect data in the Performance Measure instructions. Select the option for the instrument that works for you.

EduCorps is going to pick Tracking System and then fill in the remaining content to describe the tracking mechanism they will use.

Put It Together: Data Collection Tab

Description of Interventions

Members will lead one-on-one and small group tutoring programs to middle school students at a high-poverty school. Members meet with groups of 1-3 students after school each day for about an hour each, using mathematics enrichment materials that complement the normal classroom curriculum.

Expand each output and outcome and enter data collection information.

▼ **Output: ED1A: Number of individuals served**

Select Method: Tracking System

Add New Method

Describe the specific instrument(s) you will use to measure the output or outcome. Include the title of the instrument(s), a brief description of what it measures and how it will be administered, and details about its reliability and validity if applicable.

Enter Instrument Description: Example description of how the data collection tool for the output ensures that it meets the definition in the Performance Measure Instructions.

Enter Target Number: 180.0 **Unit of Measure:** Individuals

So in the instrument description section, you will need to enter detailed information about what the instrument is, what it measures, and how it will be administered. This information helps to confirm that your tool measures and collects the data as stated in the performance measure instructions.

Lastly, you will enter the target output value into the field.

EduCorps determined their output to be 180 individuals. Note that the Unit of Measure is pre-populated **and** greyed out. All national performance measures have pre-determined units of measure to ensure that applicants are reporting on the proper metric and definition.

If you were to create an applicant-determined measure, the unit of measure would be blank and you would need to enter that information yourself.

Put It Together: Data Collection Tab

Enter the method, instrument description, and target number for the outcome(s)

Next, you'll complete the same information for the outcome measure.

Once again if we look at the method options for outcome ED5A, they match up with the performance measure instructions. So you'll choose the option that works for your program.

Put It Together: Data Collection Tab

Mark the performance measure as complete

Still following the same process as the you did with the output instrument, you'll enter a description of the tool you're using to collect data, as well as what it measures, how it will be administered, and details about its reliability and validity.

You will also add your target outcome number. For national performance measures you cannot change the unit of measure. If the unit of measure isn't appropriate, you would need to adjust what you were measuring to be sure that it follows the performance measure instructions. If you are creating an applicant-determined outcome measure, you will need to enter the unit of measure. Remember if you're creating an applicant determined measure, make sure that your outcomes are aligned with your outputs.

Once you have filled out all the fields, you will click Mark Complete. This means that you have completed entering information about this one performance measure. Once you click Mark Complete, you will be taken…

Put It Together: Data Collection Tab

Back to the Performance Measure tab!

But now the tab looks a little different. The Summary section at the top lists the created performance measure, Helping Students Improve in Math as a completed performance measure.

If upon reviewing the summary you see some information entered incorrectly, you can edit the performance measure by clicking on the Edit button. If you need to delete the performance measure, click the Delete button.

The Performance Measures section of the tab has been cleared out so that you can add more performance measures beyond your required aligned measure connected to your primary intervention. If you want to create a new measure, you will complete the information on the Performance Measure and Data Collection tabs. Remember that you should only create performance measures for significant activities and that not all member activities need to be captured in performance measures.

If you're happy with how your performance measures look, like EduCorps is, click Next, which will take you to

Put It Together: Summary Tab
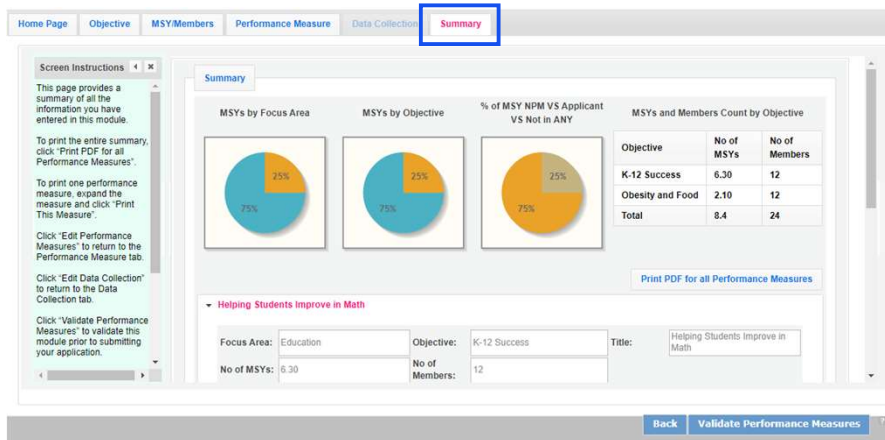
The Summary tab.

Across the top, there are three pie charts that show how MSYs are distributed at three different levels: by Focus Area, by Objective, and by performance measure types.

While you can't edit information on this tab, you may want to check the pie charts to ensure your understanding of how your MSYs are distributed.

75% of EduCorps' MSY are shown to be in one Focus Area (Education) and 25% of their MSY are shown in another Focus Area (Healthy Futures)
Similarly, 75% of EduCorps' MSYs' activities are under one objective (K-12) and 25% are under another objective (Obesity & Food)
Finally, 75% of EduCorps' MSY are part of a National Performance Measure (abbreviated as NPM), none are in applicant-determined measures, and 25% of their MSY are not assigned to any Performance Measure.

You can click Print PDF for all Performance Measures to see more detail.

Put It Together: Summary Tab

As you scroll down the Summary tab. You'll see all the performance measure information that you entered in the previous screens listed by the performance measure title.

Put It Together: Summary Tab

Describe Interventions:

Members will lead one-on-one and small group tutoring programs to middle school students at a high-poverty school. Members meet with groups of 1-3 students after school each day for about an hour each, using mathematics enrichment materials that complement the normal classroom curriculum.

Output:

ED1A: Number of individuals served

Target:	180.0 Individuals
Measured By:	Tracking System
Describe Instrument:	Example description of how the data collection tool for the output ensures that it meets the definition in the Performance Measure Instructions.

Outcome:

ED5A: Number of students with improved academic performance

Target:	126.0 Students
Measured By:	Report Card Grade
Describe Instrument:	Example description of how the data collection tool for the outcome ensures that it meets the definition in the Performance Measure Instructions.

Edit Performance Measures   Edit Data Collection   Print This Measure

Back   **Validate Performance Measures**   ?

Validate your performance measures

If you're happy with your performance measure, click the Validate Performance Measures button. If all goes well…

Put It Together: Summary Tab

Return to your grant application

You will get an alert at the top of the Summary tab saying "Success: All Performance Measures are valid. Please exit the performance measures section and go back to the main application." Hooray! To go back to the main grant application, click the back to eGrants application button. And that's it! Your Performance Measures are all set.

Questions

That's it for the walkthrough. Are there any other questions that I can answer for you now?

Resources

- Performance Measure Instructions
  - 2024 AmeriCorps Performance Measure Instructions
  - 2024 Public Health AmeriCorps Performance Measure Instructions
  - 2024 AmeriCorps Planning Grants Performance Measure Instructions

- 2024 Application Instructions

- Notice of Funding Opportunity
  - 2024 AmeriCorps State and National
  - 2024 AmeriCorps State and National Native Nations
  - 2024 AmeriCorps State and National Native Nations Planning Grant
  - 2024 AmeriCorps State and National Public Health AmeriCorps

- National Performance Measure Core Curriculum

- Best Practices in Performance Measure Design

Questions? Email AmeriCorpsGrants@cns.gov

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Once again, here are the resources that will help you with designing your performance measures.

First, you should review the 2024 Performance Measure Instructions for the funding opportunity you're applying to. Remember that Public Health AmeriCorps and Planning Grantees have their own Performance Measure Instructions.

Next, the Application Instructions. These instructions apply to all funding opportunities. Attachment A in the Application Instructions walk you through entering information into the performance measure module in eGrants, including how to enter information for output-only performance measures.

Additionally, you should review the appropriate Notice of Funding Opportunity.

AmeriCorps also has recently updated the National Performance Measure Core Curriculum. The curriculum is six modules long and is self-placed. This curriculum can give you more context for performance measurement, including how to collect high quality data.

I've also linked the video to the Best Practices in Performance Measure Design session on the competition pages.

Finally, if you have questions about Performance Measures, or any questions about the funding opportunity or grant application process, you can reach out to AmeriCorpsGrants@cns.gov for support.

Thank you!