Best Practices in Performance Measure Design

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Performance Measurement

- Ongoing, systematic process of tracking your program or project outputs and outcomes

- **Outputs**: Amount of service provided (number of people/organizations/other entities served)

- **Outcomes**: Changes or benefits that occur
  - Can reflect changes in individuals, organizations, communities, or the environment
  - Typically include changes in *knowledge, attitude, behavior,* or *condition*
  - Must have a logical connection to the intervention and be aligned with outputs
Purpose of Performance Measurement

- **Recognition of progress**
  - Collect reliable information about the intervention’s implementation and progress toward outcomes

- **Accountability to funders and stakeholders**
  - Communicate achievements in a meaningful and systematic way

- **Program improvement**
  - Spot and correct problems
  - Strengthen the intervention
  - Determine where to allocate limited resources
How CNCS Uses Performance Measures

• Tell the story of the collective impact of national service programs

• National Performance Measures (NPMs):
  – Allow use of shared language for outputs and outcomes that multiple programs have in common
  – Available in all CNCS focus areas

• Applicant-determined Measures:
  – Intended for programs whose interventions, outputs, or outcomes do not fit under existing National Performance Measures
• At least one aligned performance measure (output paired with outcome) connected to primary intervention
  – May be National PM or applicant-determined PM
  – Additional PMs, including output-only NPMs, are permitted but not required
• Performance measures reflect significant activities in applicant’s Theory of Change
  – No need to capture all program activity in performance measures
National Performance Measure Instructions

- Fundamental guidance document
- Shows selection rules and instructions for each National Performance Measure
- Also includes helpful appendices:
  - MSYs and member allocations tutorial (Appendix A)
  - Performance Measure Checklist (Appendix B)
  - FAQs (Appendix C)
- Linked from main NOFO page:
Performance Measure Changes in 2019

• Simplified the NPM matrix by reducing the number and complexity of measures
• Made NPMs more inclusive and reduced barriers to use
• Provided NPM outcome options in all focus areas
• Focused performance measures exclusively on community impact
  – Key member-focused outputs and outcomes will be captured in demographic indicators

**All applicants, including continuation applicants, must follow the 2019 National Performance Measure Instructions**
Best Practices: Performance Measure Design

• Select PMs that fit your program design and theory of change, not vice versa
• Read the instructions
• Less = more: restrict PMs to significant program activities
• Clearly define terms and ensure they are meaningful
• Use national measures when they fit the program design
• Use system-defined intervention categories when possible
Best Practices: Performance Measure Design

• Clearly distinguish outcomes from outputs while maintaining logical alignment
• Choose outcome measures that are ambitious but realistic
• For outcomes that require participant follow-up, set targets that take into account response rate attrition
• For longer-term outcomes, set targets that are achievable in a single grant year
Best Practices: Performance Measure Design (continued)

- Use numerical targets, not percentages
- Use pre-post assessments when possible
- Select data collection instruments that are valid (measure what they are supposed to measure) and reliable (yield consistent results)
- Choose data collection instruments that are accessible and yield timely data
- Allocate sufficient resources toward data collection efforts: money, time, personnel
Designing a Measure: Education

Program Overview:

The EduCorps Program is requesting six half-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.
Step 1: Choose the Right Measure(s) and Intervention(s)

- Primary service activity: academic tutoring (K-12 Success)

<table>
<thead>
<tr>
<th>Strategic Plan Objective</th>
<th>Selection Rules</th>
<th>Interventions</th>
</tr>
</thead>
<tbody>
<tr>
<td>K-12 Success</td>
<td>ED1A: Number of individuals served</td>
<td>Tutoring, Mentoring, Other Classroom Support, Out-of-School Time, Family Involvement, Service Learning, Summer Learning, Classroom Teaching, Opioid/Drug Intervention</td>
</tr>
<tr>
<td></td>
<td>ED5A: Number of students with improved academic performance</td>
<td></td>
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<tr>
<td></td>
<td>ED9: Number of students graduating from high school on time</td>
<td></td>
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<tr>
<td></td>
<td>ED10: Number of students enrolling in post-secondary education/training</td>
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<td></td>
<td>ED27C: Number of students with improved academic engagement or social-emotional skills</td>
<td></td>
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<td></td>
<td>ED6: Number of students with increased attendance</td>
<td></td>
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<tr>
<td></td>
<td>ED7A: Number of students with decreased disciplinary incidents (referrals, suspensions/expulsions, criminal or gang involvement)</td>
<td></td>
</tr>
</tbody>
</table>
Step 2: Study the Instructions for Each Measure

- Read the NPM Instructions for each measure to make sure the program can meet the requirements

<table>
<thead>
<tr>
<th>ED1A (output)</th>
<th>Number of individuals served</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition of Key Terms</strong></td>
<td></td>
</tr>
<tr>
<td>Individu<strong>als</strong>: recipients of CNCS-supported services related to education; may include students enrolled in grades K-12, out-of-school youth, preschool age children, and/or individuals pursuing postsecondary education</td>
<td></td>
</tr>
<tr>
<td>Served**: substantive engagement of individuals with a specific education-related goal in mind. Cannot consist solely of mass dissemination of information such as email blasts, social media posts, or distributing pamphlets.</td>
<td></td>
</tr>
<tr>
<td><strong>How to Measure/ Collect Data</strong></td>
<td>Tracking mechanism that ensures an unduplicated count of individuals who have received services</td>
</tr>
</tbody>
</table>
Step 2: Study the Instructions for Each Measure (continued)

- Applicants that cannot meet the requirements for a measure should not use it.
Step 3: Define All Terms Clearly

- **ED5A:**
  - **Improved academic performance:** an improved demonstration of skill or knowledge in one or more academic subjects
  - *EduCorps’ definition:* At least 1.1 years of academic growth from the beginning to the end of the school year.
Step 4: Calculate MSY and Member Allocations

• Determine how many members, and what portion of member time (MSYs), will be devoted to activities captured by the PM

• Members can be counted toward more than one PM; MSYs cannot

• Not all members and MSYs need to be allocated to PMs

• *EduCorps MSY and member allocations:*
  – 6 members
  – 2.0 MSY (2/3 of total member time [3.0 MSY])
Step 5: Set Output and Outcome Targets

- Targets should be ambitious but realistic
- Outcome targets should relate logically to output targets

_EduCorps targets:_
- ED1A: 90 students
- ED5A: 60 students
**Step 6: Select Appropriate Instruments**

- Must meet criteria specified in National Performance Measure Instructions

| Standardized test, report card grade, or other instrument capable of measuring changes in academic performance at the individual beneficiary level. When possible, pre-post assessments should be utilized. |

- Must meet fundamental data quality standards
Step 7: Put it All Together

Performance Measure: Helping Students Improve in Math

<table>
<thead>
<tr>
<th>Focus Area:</th>
<th>Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective:</td>
<td>K-12 Success</td>
</tr>
<tr>
<td>No. of MSY’s:</td>
<td>2.0</td>
</tr>
<tr>
<td>No. of Members:</td>
<td>6</td>
</tr>
</tbody>
</table>

Selected Interventions:

- Tutoring

Output:

ED1A: Number of individuals served

| Target: | 90 Individuals |

Measured By: Tracking System

Described Instrument: AmeriCorps members will record in the program’s secure database the name and ID number of each student who enrolls in the tutoring program. The list of names/IDs will be checked to ensure that no student is counted twice.

Outcome:

ED5A: Number of students with improved academic performance

| Target: | 60 Students |
Additional Resources


• Performance Measurement Core Curriculum: http://www.nationalservice.gov/resources/performance-measurement/training-resources
  – Performance Measurement Basics
  – Theory of Change
  – Evidence
  – Quality Performance Measures
  – Data Collection and Instruments
Additional Resources (continued)

• How to navigate the eGrants Performance Measure Module:

Email AmericorpsGrants@cns.gov with any questions related to the 2019 National Performance Measure Instructions