



Serve Washington

Changing Communities. Changing Lives.

Planning Grants – Measures, Data, Evaluation

October 15 – 10:00AM

Please sign-in via the chat box:

- Organization/Program
- Name(s)
- What is your best self-care tip?

PSA

The Great
Washington
**Shake
Out**TM



Announcement!

Regional Training Conference

Location: Albuquerque, NM

Tentative Date: May 4-6, 2021

(original schedule said “spring”)

Stay Tuned!



Learning To Date

Previous Content

- Orientation/AmeriCorps 101
- Locating/Reviewing/Reading AmeriCorps Guidance
- Theory of Change/Logic Models/Evidence
- NOFO and Partnerships

Today's Agenda

- **Performance Measures**
- **Data Collection**
- **Evaluation**

Next Up (*November 19*)

- Member/Site Development –
Benefits/Eligibility/Recruit/Select



Quarterly Questions

- *Are any partner agreements necessary for data collection?*
- *How will members/sites be oriented to data collection?*
- *What checks and balances will be needed to ensure fidelity in data collection?*
- *How will the program ensure a diverse/inclusive AmeriCorps team?*
- *How will the program encourage esprit de corps among the AmeriCorps team?*
- *How will the program prepare AmeriCorps members for Life After AmeriCorps?*
- *If using host sites, what role will they have in member development?*
- *How does this new knowledge change the budget/match in order to run a successful program?*





High Quality Performance Measures

What is Performance Measurement?

What makes a high quality performance measure?

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Module Overview

Performance Measurement

- Review of concepts and definitions
- Comparison to Impact Evaluation

Ensuring High Quality Performance Measures

- Understand alignment within theory of change
- Review characteristics of a high quality outcome
- Check alignment of outputs and outcomes

Performance Measurement and Impact Evaluation

Differences: Key Areas	Performance Measurement	Impact Evaluation
Causality	Assumes causality; does <i>not</i> “prove” theory of change	Seeks to show causality and “prove” theory of change
Implementation	Tracks outputs and outcomes on a regular, ongoing basis	May occur from time to time, but not on a regular, ongoing basis
Design	strives for high-quality data, while balancing rigorous data collection and what is feasible for program staff to measure on an ongoing basis.	Explores the program’s effect on the people, families, or communities it is serving (i.e. whether a program is producing results or having an impact)

Systematic Process for Measuring Outputs and Outcomes

Outputs

- Amount of service provided (people served, products created, or programs developed)



Systematic Process for Measuring Outputs and Outcomes


Outcomes

- Reflect the changes or benefits that occur
- Can reflect changes in individuals, organizations, communities, or the environment
- Address changes in attitudes/beliefs, knowledge/skills, behavior, or conditions



Outcomes

Types of Outcomes


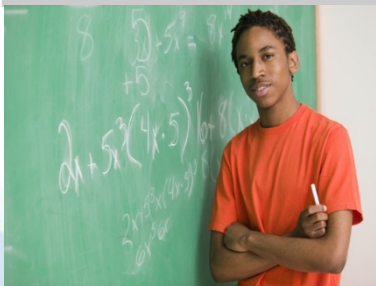


Attitude/Belief	Knowledge/Skill	Behavior	Condition
Thought, feeling	Understanding, know-how	Action	Situation, circumstance
			

Outcome Examples— Education

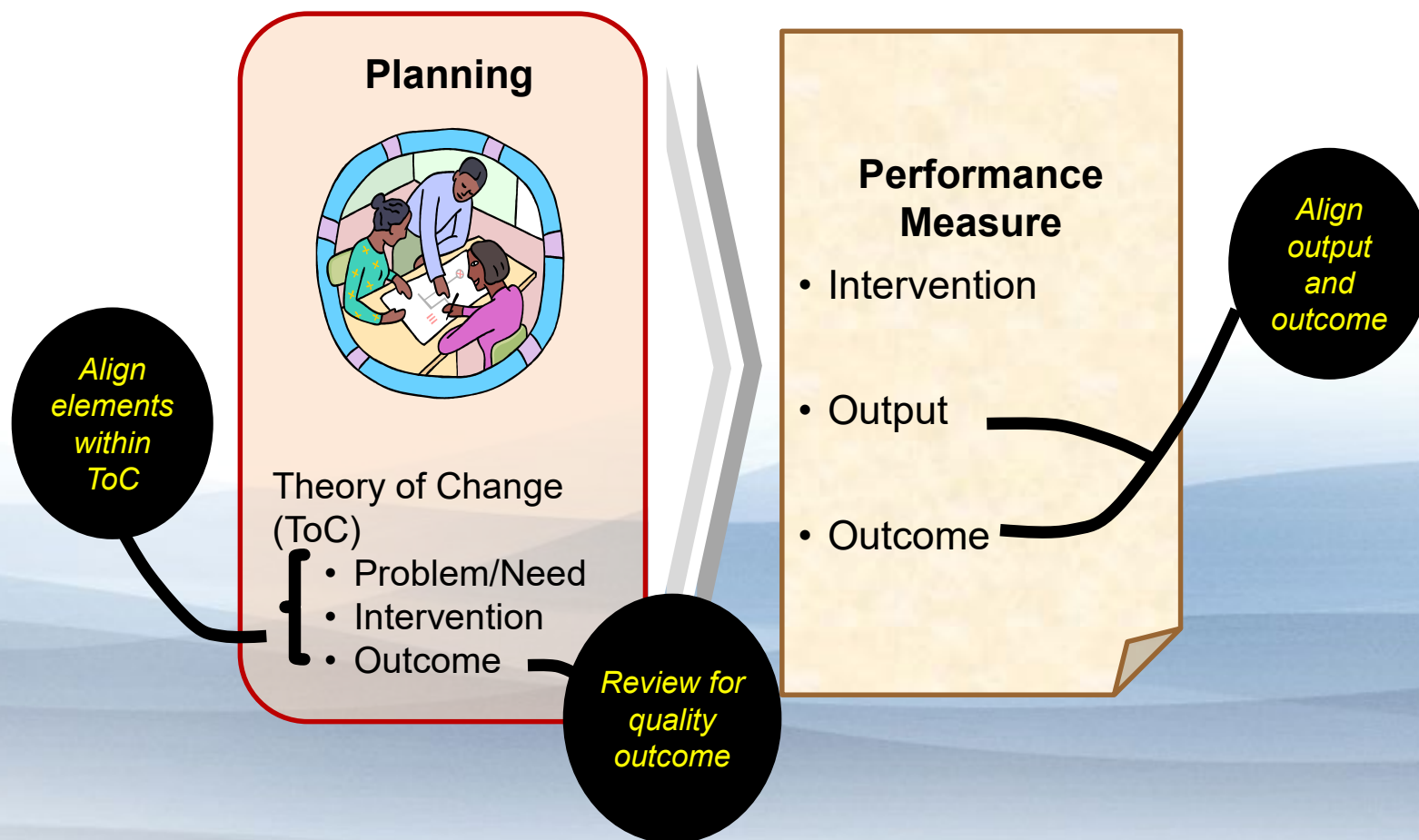
Attitude/Belief	Knowledge/Skill	Behavior	Condition
			

- Increased school attendance
- Increased interest in school
- Successful completion of High School
- Improved math ability

Outcome Examples— Education

Attitude/Belief	Knowledge/Skill	Behavior	Condition
Increased interest in school	Improved math ability	Increased school attendance	Successful completion of High School
			

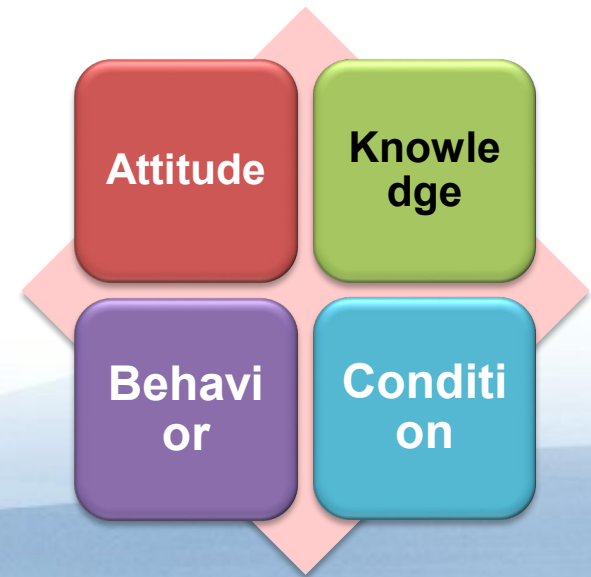
Aligning Theory of Change Elements



Identifying a High Quality Outcome

The Outcome should:

- Be meaningful
- Be ambitious yet realistic
- Reflect the type of change (attitude, knowledge, behavior, or condition) you want to measure



Meaningful Outcome

Criteria for a meaningful outcome. Consider:

- **Community Need/problem:** Is the outcome addressing it?
- **Compelling/powerful.** Is the outcome central or peripheral?



Meaningful Outcome

Criteria for a meaningful outcome. Consider (continued):

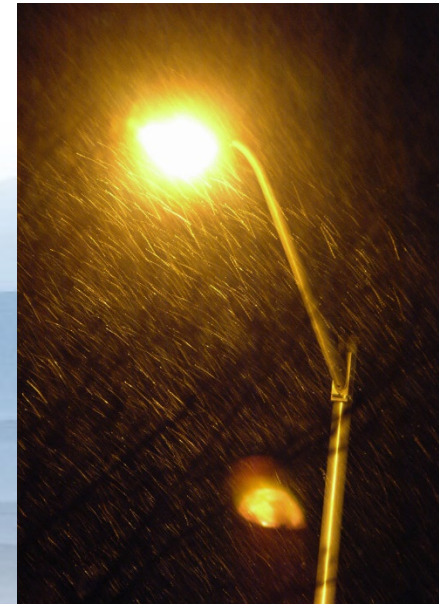
- **Beneficiaries.** Is the target audience identified in the outcome?
- **Scope of the outcome.** How many will benefit?
- **Magnitude of the outcome.** How much change will occur for beneficiaries?
- **Evidence.** Is the outcome supported by evidence for the intervention?



Ambitious yet Realistic

**Is the outcome too modest?
Consider:**

- Outcome should reflect an ambitious change expected from the intervention
- Outcome resulting from full “dosage” of intervention



Ambitious yet Realistic

Is the outcome too ambitious?

Consider:

- Program timeframe
- Severity of the problems being addressed
- Program resources



Reflect the Type of Outcome

Has the outcome type been identified: attitude, knowledge/skills, behavior or condition?

- Outcome type should be same as theory of change
- Outcome type will inform instrument



Veteran Example: Type of Outcome

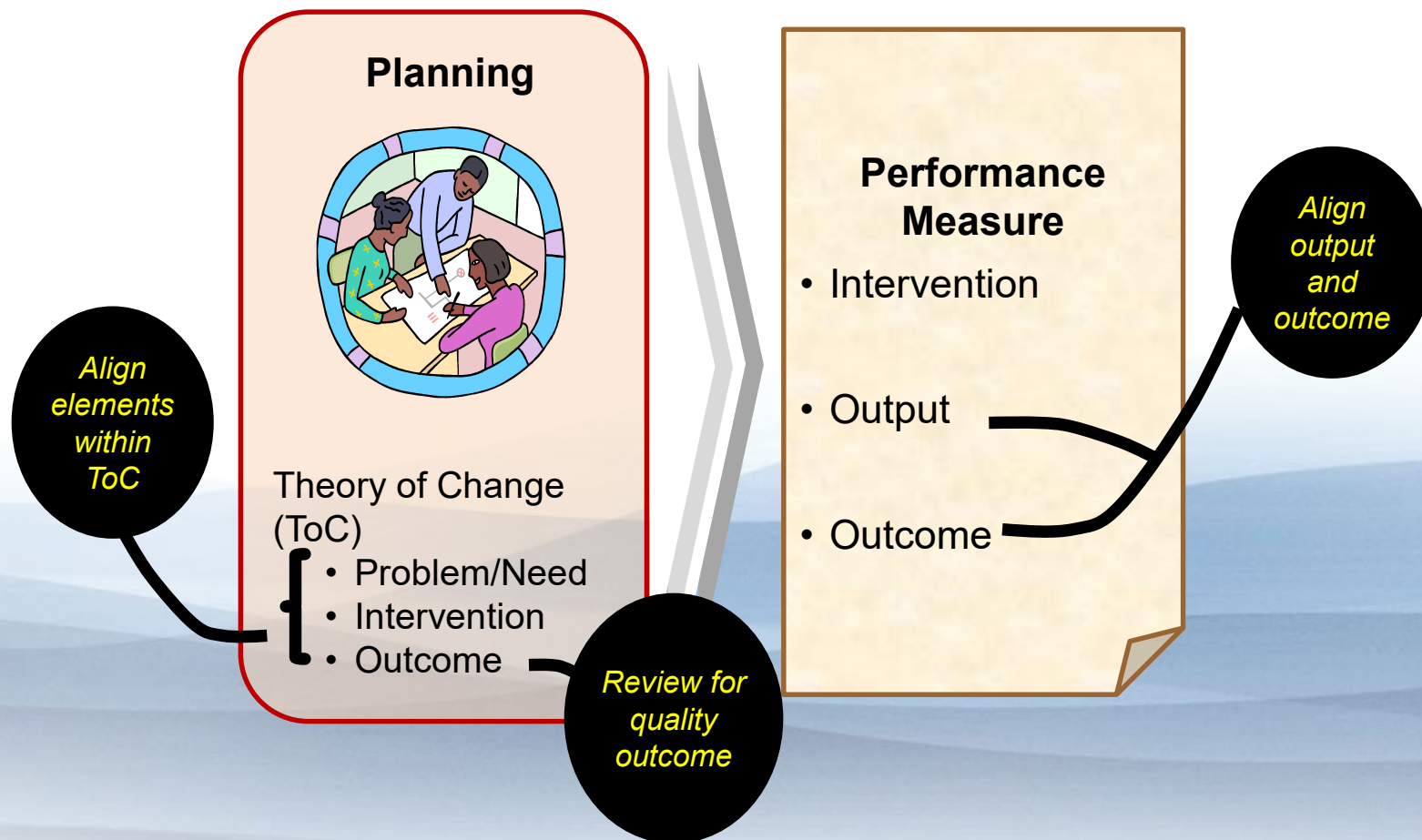
Which type of outcome?

NEED: 35% of young veterans (18-24 year olds) are unemployed (Department of Veteran Affairs, 2011). Economists cite a lack of marketable civilian skills and the need for education degrees, vocational certifications...

INTERVENTION: National service participants support veterans in completing training programs by assisting in locating appropriate programs, securing financial aid, and by providing internship placements.

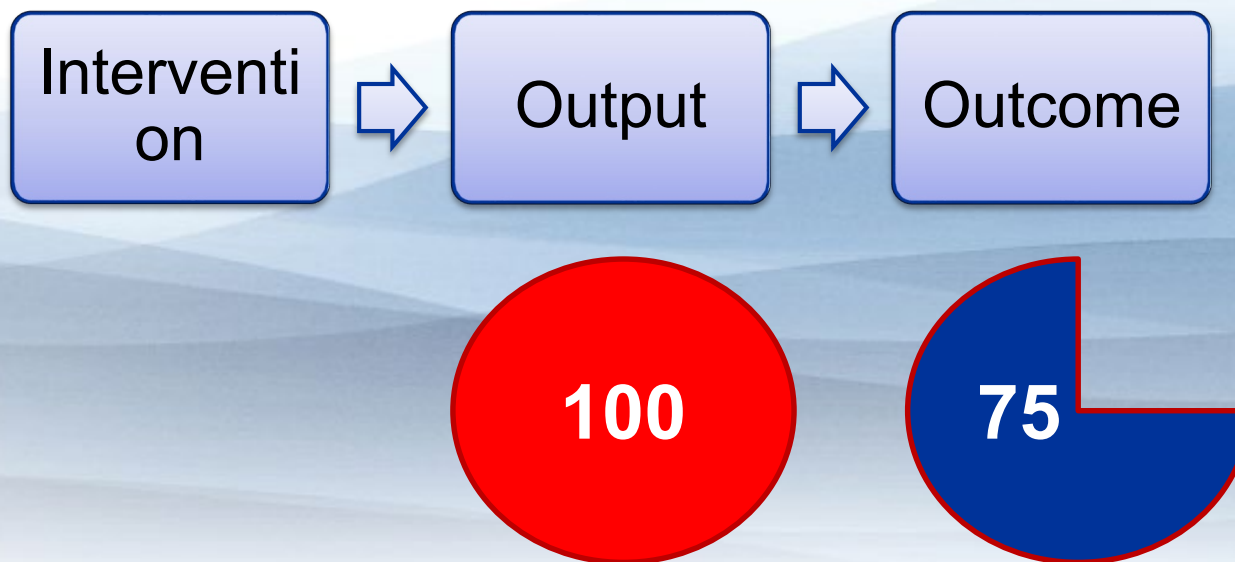
1. Veterans report increased confidence about finding employment. (attitude)
2. Veterans demonstrate new technical skills. (knowledge/skills)
3. Veterans are placed in jobs. (condition)

Align Output and Outcome



Alignment of Outputs and Outcomes

- Intervention produces output
- Output leads to the outcome
- Output and outcome measure the same intervention and beneficiaries



Housing Example: Output-Outcome Alignment

INTERVENTION: Construction teams assess housing request, plan and execute housing upgrades and repairs and complete inspection requirements for individuals with disabilities.

OUTPUT: Individuals with disabilities receive housing service (upgrades and repairs).

OUTCOME: Construction team members improve construction skills.

Do the intervention and output align?

Why or why not?

Housing Example: Output-Outcome Alignment

INTERVENTION: Construction teams assess housing request, plan and execute housing upgrades and repairs and complete inspection requirements for individuals with disabilities.

OUTPUT: Individuals with disabilities receive housing service (upgrades and repairs).

OUTCOME: Construction team members improve construction skills.

Do the intervention and output align?

☒ **Yes**

☐ **No**

Why or why not?

Logical to assume if well-designed and implemented

Housing Example: Output-Outcome Alignment

INTERVENTION: Construction teams assess housing request, plan and execute housing upgrades and repairs, and complete inspection requirements for individuals with disabilities.

OUTPUT: Individuals with disabilities receive housing services (upgrades and repairs).

OUTCOME: Construction team members improve construction skills.

Do the output and outcome align?

Why or why not?

Housing Example: Output-Outcome Alignment

INTERVENTION: Construction teams assess housing request, plan and execute housing upgrades and repairs and complete inspection requirements for individuals with disabilities.

OUTPUT: *Individuals with disabilities* receive housing service (upgrades and repairs).

OUTCOME: *Construction team members* improve construction skills.

Do the output and outcome align?

☐ Yes

☒ No

Why or why not?

2 different groups of beneficiaries

Using Performance Measurement in Program Management

Site Recruitment and Selection

- Define expectations
- Assess site applications; determine which sites are best able to implement intervention



Using Performance Measurement in Program Management

Using Results/Data and Reporting

- Progress reports
- Marketing and promotion
 - Strengthen stakeholder buy-in
 - Resource development; make the case for support
- Celebrate success!



Identifying a Data Source

- Data source: The person, group or organization that has information to answer the measurement question
 - Identify possible data sources; list pros and cons of each
 - Identify a preferred data source; consider its accessibility
 - Alternative data sources: consider if they can give you same or comparable data



Data source and type of outcome

Depends partly on the type of change you want to measure - attitude, knowledge, behavior, or conditions.

- Data on changes in attitudes or knowledge usually come directly from persons experiencing these changes.
- Data on changes in behavior or conditions can come from either persons experiencing these changes or from other observers.



Where to Find Instruments

- Programs and projects can look anywhere they like to find instruments:
 - Use Internet search engines
 - Talk to others within your professional network to find out what they are using
 - Look at evidence for intervention – how has it been measured before?



Instrument Design Issues

- Crowded layout
- Double-barreled questions
- Biased or “leading” questions
- Questions that are too abstract
- Questions that use unstructured responses inappropriately
- Response options that overlap or contain gaps
- Unbalanced scales

Crowded Layout

Problem: Crowded layout

Most of the time, how do you feel about doing homework?

- ☐ I usually hate doing homework ☐ I usually don't like doing homework
☐ I usually like doing homework ☐ I usually love doing homework

Solution: Don't use crowded layouts

Most of the time, how do you feel about doing homework?

- ☐ I usually hate doing homework
☐ I usually don't like doing homework
☐ I usually like doing homework
☐ I usually love doing homework

Double-barreled Question

Problem: Asking two questions in one

How do teachers and students at your school feel about the mentoring program?

They strongly
like it
☐

They
like it
☐

They are
undecided
☐

They dislike it
☐

They strongly
dislike it
☐

Solution: Break out questions separately

How do *teachers* at your school feel about the mentoring program?

They strongly
like it
☐

They
like it
☐

They are
undecided
☐

They dislike it
☐

They strongly
dislike it
☐

How do *students* at your school feel about the mentoring program?

They strongly
like it
☐

They
like it
☐

They are
undecided
☐

They dislike it
☐

They strongly
dislike it
☐

Biased or “Leading” Question

Problem: Biased or “leading” questions

Has the mentoring program improved how you feel about going to school?

- ☐ Yes
- ☐ No
- ☐ No opinion

Solution: Use neutral questions

How has the mentoring program affected how you feel about going to school?

- ☐ I feel better about going to school.
- ☐ I feel worse about going to school.
- ☐ I feel about the same about going to school.

Abstract or Broad Question

Problem: Questions are too abstract or broad.

Did you enjoy the mentoring program?

☐ Yes ☐ No ☐ Not Sure

Solution: Make questions more concrete and specific.

Would you recommend the mentoring program to other students?

☐ Yes ☐ No ☐ Not Sure

Not Using Structured Responses

Problem: Using unstructured responses when structured responses are appropriate

How much do your grades matter to you?

Solution: Provide structured responses when appropriate

How much do your grades matter to you?

- ☐ Not at all
- ☐ A little
- ☐ Somewhat
- ☐ A lot

What else to look for in selecting an instrument

- Can the instrument work in your context?
- Does the instrument use simple and clear language?
- Is the instrument appropriate for the age, education, literacy, and language preferences of respondents?



Summary of Key Points

- Performance measurement is a systematic process of measuring progress (outputs and outcomes)
- Performance measurement does not seek to “prove” a theory of change, but can provide snapshots.
- Impact evaluation can determine if results occurred because of the intervention.

Summary of Key Points

- Strong performance measures align with the theory of change (need, intervention and outcome)
 - The intervention is based on evidence that supports a cause-and-effect relationship between the intervention and an intended outcome.
 - The theory of change helps identify an appropriate outcome to measure.



5 MINUTE BREAK

Optional Activity (1 min):

<https://www.instagram.com/p/B-plHz5nyVZ/?igshid=84e9ersdtf4c>

This quick exercise guides you through 5 safe, nurturing, and containing self-holds that offer you the human touch you may need

Learning objectives

EVALUATION

Become familiar with the evaluation requirements

Understand 6 critical elements to lay the foundation for future evaluation work

Planning Grant & Pre-award Time Period

**Do everything you can to set your program up
for success in Year 1**

**Think through risks/threats to implementation
and mitigate them**

Begin to develop data collection systems

**Begin to develop performance measurement
plans**



Key Requirements



When applying for your first 3 year cycle...

Submit: Data Collection Plan

When applying for your second 3 year cycle...

Submit: Evaluation Plan

During your second 3 year cycle...

Complete: your evaluation as planned (it must cover 1 year of AmeriCorps program activity)

When applying for your third 3 year cycle...

Submit: 1. Evaluation Plan for next cycle and

2. Evaluation Report of the evaluation you just completed

Key Requirements

If you are a...

***The following evaluation
requirement applies...***

Grantee with an annual
CNCS grant under
\$500,000

Internal or Independent
Evaluation (impact,
outcome, or process)

Grantee with an annual
CNCS grant of \$500,000
or more

Independent Impact
Evaluation

Key foundational elements



1. Program design and implementation
2. Build and refine data collection systems
3. Performance measurement
4. Staff capacity and responsibilities
5. Evaluation planning
6. Become a learning organization

1. Program design and implementation

Goal: Improve program design and ensure effective implementation

- Key components
 - Refine logic model
 - Assess implementation
 - Conduct process evaluation
 - Adjust program model as needed



Assess implementation



- Implementing your program may lead to changes:
 - In your logic model
 - Some parts may not be plausible
 - Some outcomes may not be realistic
 - In how your program operates



2. Build and refine data collection systems

Goal: Build systems to collect and manage high-quality program data

- Key components
 - Select data collection instruments
 - Build data collection system
 - Build data management system
 - Obtain access to administrative data (if applicable)
 - Ensure data quality

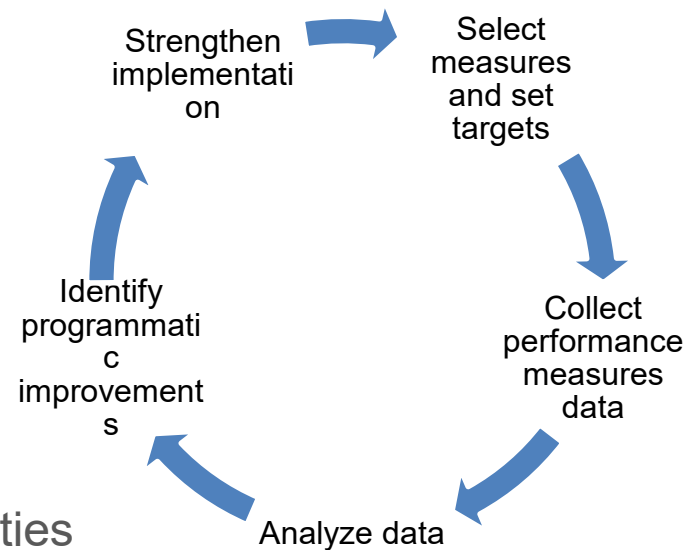
Data management system

- Data management system should help you to:
 - Store data
 - Access data
 - Analyze data
 - Use data
- Build (or buy) a system to accomplish those goals



3. Performance management

- Do not just collect and report your performance measurement data
 - you need to use it!
- Are goals being met?
- Use data for program improvement
 - Continuous feedback loop
 - Programmatic decisions are grounded in data
 - Strengthen implementation
- Good performance measurement becomes the basis for future evaluation activities



Connection to evaluation

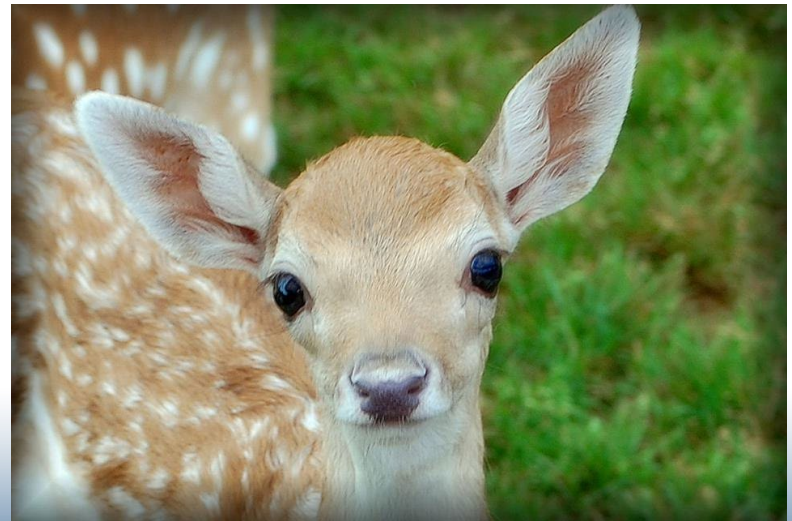


- Good performance measurement can be the basis for future evaluation activities
 - Outcome measures may be extended
 - Instruments can be utilized
 - Data can suggest interesting research questions
- Performance measurement does not stop once evaluation begins

4. Staff capacity and responsibilities

Goal: Build staff capacity to collect, manage, and utilize data

- Key components
 - Develop internal staff skills
 - Assign responsibilities



Internal staff capacity

- Develop staff skills in data collection, management, and analysis
- Know enough to know what you know, and know what you don't know
- Staff do not have to be experts, but they need to be educated and informed consumers
- Assign responsibilities – someone has to take ownership of key tasks



5. Evaluation planning



You will develop a evaluation plan at the end of your first grant cycle, which will be submitted when you apply for your second grant cycle

- <https://www.nationalservice.gov/resources/evaluation>
 - Training resources, policies, evidence exchange, and more

Becoming a learning organization

- A learning organization:
 - Reflects on past successes and challenges
 - Uses data to inform decision making
 - Makes adjustments to programs and processes based on data
 - Is not afraid to question assumptions
 - Thinks strategically about how to improve
 - Builds evidence of effectiveness
 - Sets a research agenda for the future

Milestones

By the end of your first grant cycle, you should have:

- Refined your program and ensured effective implementation
 - Built and refined data collection systems
 - Utilized accurate performance measures
 - Built staff capacity and defined responsibilities
 - Prepared a plan for your first evaluation
- +
- Become a learning organization



And hopefully you've also had some fun!

“Homework”

- *Continue reviewing and reading AmeriCorps guidance documents.*
- *Continue any unfinished objectives; such as Theory of Change and Logic Model, familiarizing yourself with NOFO materials, identifying Host Sites and Strategic Partnerships.*
- *Continue budget adjustments as necessary.*
- **Think about which aspects of the program are best measured annually and which are best measured in an evaluation or long-term research agenda.**
- **Review CNCS Performance Measure Instructions.**
- **Begin developing one aligned performance measure (one output, one outcome, and associated data collection plan).**



Deliverables

- Theory of Change
- Logic Model

Submit to Program Officer anytime through October 31 (end of quarter) for general feedback. Lou and Robyn will also be supporting that feedback process internally at Serve WA.

Continue to discuss/asses throughout the planning grant year.

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Closing

Questions?

