PM BUILDER

AmeriCorps PM Plan Checklist

Instructions: Use this checklist to complete the sections of your PM Plan and then transfer the information to your performance measures in eGrants. You will need to add information that was not selected in your PM Plan; that information is noted in this checklist.

☑ ISSUE AREA: Selected in PM Builder. The Issue Areas in the PM Builder correspond to the Issue Areas listed in eGrants, except for "Participant Development" and "Community Strengthening.". If you choose Participant Development or Community Strengthening in the PM Builder, choose an Issue Area option in eGrants that best describes the focus of your program activity.

❑ PERFORMANCE MEASUREMENT TITLE: Type in a title related to the service activity or result in the text box that eGrants provides.

❑ SERVICE CATEGORY: Select a Service Category from the drop down menu in eGrants that best describes the type of service you are measuring.

☑ SERVICE ACTIVITY DESCRIPTION: Selected in the PM Builder, but you will need to expand on the brief statement for your performance measures.
❑ Add your program's activity details. Complete this section. In eGrants, you will put this information in a text box labeled "Strategy to Achieve Results". Did you include the following in your description? If no, add the information.

	Yes	No
Does it state how many members will participate in the activity?	❑	❑
Is it stated how often and for how long members will perform the activity?	❑	❑
Is the name and type of organization through which members provide service identified?	❑	❑
Is it clear exactly what members will be doing to address the need?	❑	❑
Is it stated who will be the direct recipients of this service?	❑	❑
Is it clear how beneficiaries will be selected to participate in the activity to assure your service is given to those who need it?	❑	❑
Will this activity, as described, address the need identified by the program?	❑	❑

> TIP: Describing your service activity: Stating that members will "assist", "supervise", "mentor", or "clean up", does not describe *how* the activity operates. W*hat* will members be doing in this activity? *How* will members achieve the expected results?
> **Example**: "Five AmeriCorps members will implement a drop-out prevention program consisting of sixteen classes for parents. The class activities will be designed to provide parents with the support they need to keep their children in school. The eight-week sessions will be offered three times, beginning in October 2008, January 2009, and March 2009."

RESULT TYPE: OUTPUT

The selection you made in the PM Builder under "Output" is your output statement and indicator. You will need to complete the output section of your performance measures by adding the target, data collection information ("instrument"), performance measure statement, and prior year's data, if available.

☑ Output Result Statement: Selected from the PM Builder. If needed, modify your selection. Consider:

	Yes	No
Has the output been sufficiently defined? Is it clearly stated who (persons or groups) will be served or what will be created?	❑	❑
Does the output flow logically from the activity? Will it occur because of this activity?	❑	❑

☑ Indicator: Selected from the PM Builder. If needed, modify your selection. Consider:

	Yes	No
Does the indicator clearly state what you will count to measure the output? Is it stated what specifically will be looked at to gauge outputs?	❑	❑
In some cases, you may wish to include information on how much service a person receives to be considered a beneficiary (the "dosage" of service). For example, "number of seniors served *who receive at least one meal a week*" or "number of students served *who attend at least three drop-in sessions*" define the minimum dosage of service you expect beneficiaries to receive.	❑	❑

❑ Target Description: Develop a complete target statement. Consider:

	Yes	No
Does the target statement refer specifically to your output indicator? That is, does it state how many people will be served and/or how many products will be created?	❑	❑
Since you will be reporting results in terms of *actual data,* it is essential to express targets in *measurable terms.* Does the target identify an annual numerical achievement?	❑	❑
Is the target realistic, given time, resources, and the service activity?	❑	❑

❑ Target Number: In eGrants, enter a target number and indicate whether this number is an integer or a percentage.

☐ Instrument: Under “Instrument” in eGrants, provide the name of the instrument and briefly describe your data collection process. Does your description include the following? If no, add the information.

	Yes	No
Is the data source for the output identified, and is it appropriate for the output information needed?	☐	☐
Did you identify who would be responsible for collecting the data? (The person’s title, such as “supervisor”, is sufficient; you do not need to provide a name.)	☐	☐
Did you say when the data would be collected and how often?	☐	☐
Did you give the name of the instrument and say how it will be administered? (Do not include instruments that will be used to track other results; only include the instrument for this output.)	☐	☐
Would someone unfamiliar with your program and processes understand how you plan to collect data by reading your description?	☐	☐

> Tip: Choosing a data source: Select sources that provide the necessary data most directly and consistently. Confirm that you will be able to get the data from this source in the form you need well in advance.

☐ Performance Measure Statement

	Yes	No
Is the complete performance measure restated by combining the result and target, without adding new information?	☐	☐

Cheat Sheet! Here are some brief definitions of some of the terms used in this checklist:

- **Outputs** are counts of the amount of service produced.
- **Outcomes** specify changes that have occurred in the lives of members and/or beneficiaries.
- An **indicator** is a specific item of information that will demonstrate progress toward achieving the result.
- The **data source** is where you will get the information you need to measure the result.
- The **method** is how you will collect the data (e.g. collecting pre and post test scores, interviewing participants, distributing a questionnaire).
- **Instruments** are forms, such as surveys or logs, used to collect and record the information from the data source.

RESULT TYPE: INTERMEDIATE OUTCOME. You selected most of this Outcome section in the PM Builder, but you may want to revise or expand on the selections for your performance measure. You will also need to add a target, some data collection information, a performance measure statement, and prior year's data, if available.

☑ Outcome Result Statement: Selected in the PM Builder. You may want to expand or revise the results statement that you selected. Review your outcome statement and consider:

	Yes	No
Are the beneficiaries clearly identified? Is it clearly stated who or what directly changes because of this activity?	❑	❑
Is it clear what will change (knowledge, skill, attitude, behavior, condition) or what benchmark will be reached for the recipients? Is only one outcome identified?	❑	❑
Does the outcome flow logically from the activity? Will it occur because of this activity?	❑	❑

☑ Indicator: Selected in the PM Builder. You may want to expand or revise the indicator that you selected. If yes, review your outcome indicator and consider:

	Yes	No
Is it stated what specifically will be looked at to gauge progress toward the outcome? How will you know you are achieving the outcome?	❑	❑
In some cases, it may be appropriate to add a minimum dosage of service (i.e. how many hours of service would a person receive to show the expected outcome?). For example, "the percent of students who receive at least 40 hours of tutoring will show…*(the expected outcome)".*	❑	❑

❑ Target Description: Develop a complete target statement. Consider:

	Yes	No
Does the target respond specifically to your outcome indicator and not something else?	❑	❑
Does the target statement identify: • who or what will change; • the specific change that will occur; • the amount of change that will occur; and • the time period over which the change will occur?	❑	❑
Since you will be reporting results in terms of *actual data,* it is essential to express targets in *measurable terms.* Does the target identify a numerical achievement?	❑	❑
Is the target realistic but ambitious, given time, resources, and the service activity?	❑	❑

❑ Target Number: In eGrants, enter a target number and indicate whether this number is an integer or a percentage.

❑ Instrument.
- ☑ Data Source: Selected from PM Builder
- ☑ Instrument: Selected from PM Builder

Under "Instrument" in eGrants, provide the name of the instrument and briefly describe your data collection process. Does your description include the following? If no, add the information.

	Yes	No
Is the data source for the outcome identified, and is it appropriate for the outcome information needed?	❑	❑
Did you identify who would be responsible for collecting the data? (The person's title, such as "supervisor", is sufficient; you do not need to provide a name.)	❑	❑
Did you say when the data would be collected and how often?	❑	❑
Did you give the name of the instrument and say how it will be administered? (Do not include instruments that will be used to track other results; only include the instrument for this output.)	❑	❑
If you are going to measure an increase or decrease in something (skill, attendance, test scores), comparison and/or baseline data is needed. If needed to analyze the target, has comparison data been identified and where and when it will be collected?	❑	❑
Would someone unfamiliar with your program and processes understand how you plan to collect data by reading your description?	❑	❑

❑ Performance Measure Statement

	Yes	No
Is the complete performance measure restated by combining the result and target, without adding new information?	❑	❑

Tip: Use a logic model: Develop a logic model to identify **outputs** and **outcomes** that will result from your service activity. The things accomplished (outputs) should directly connect to the changes experienced by beneficiaries (outcomes). For information on how to complete a logic model, see the Toolkit (http://nationalserviceresources.org/star/ac-toolkit) and other helpful materials at the Resource Center (http://nationalserviceresources.org/star/ac-logic).

RESULT TYPE: END OUTCOME. The PM Builder helped you select your intermediate outcome; however, you will still need to identify an end outcome for your primary activity. End outcome results for AmeriCorps programs may not become evident until more than three years after the initial intervention. You are not expected to report on end outcome results.

Performance measurement outcomes should be aligned and occur as a result of the service activity and outputs described. If you developed a logic model, you already have some ideas for end outcomes.

- Intermediate outcomes specify changes that have occurred in the lives of beneficiaries, but may be short of a significant benefit to them.
- End outcomes are the more significant changes realized by beneficiaries. The initial changes realized by beneficiaries (intermediate outcomes) should lead directly to the most significant changes (end outcomes).

> TIP: Keeping the End in Mind: Plan for Reporting. What do you want to be able to tell stakeholders at the end of the year? Take some time now to consider what you would like to report, to whom, and what steps need to happen. Careful planning and organization now will save you time and anxiety later, and allow you to produce a quality report that really showcases your program's successes.

Prepare for Reporting	Yes	No
Do you have your report deadline for the Corporation on your calendar?	❑	❑
Do you have your report deadlines for other stakeholder groups (funders, advisory board, volunteer newsletter, sites reports) on your calendar?	❑	❑
Do you have your report deadlines for *first drafts* on your calendar?	❑	❑
Have you identified someone in your organization that can review the first draft and give you feedback?	❑	❑
Is the report writer identified? If yes, have you determined when you need to get them the analyzed data?	❑	❑
Is the individual identified who will analyze the data? If yes, do you know when you need to get them the raw data for analysis so that it is ready for the report?	❑	❑

For more information on performance measurement requirements, terms and examples, logic models, data collection processes and tips, review the AmeriCorps toolkit, tutorials, and other material on The Resource Center: http://nationalserviceresources.org/star/star.

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