**PM BUILDER**

# Senior Corps PM Plan Checklist

***Instructions****: The PM Plan you built in the Performance Measurement Builder can be used as a basis for your Senior Corps work plans. Use this checklist to complete the sections of your PM Plan and then transfer the information to your work plan in eGrants. You will need to add information to your work plan that was not selected in your PM Plan; that information is noted in this checklist.*

☑ **ISSUE AREA**: Selected in PM Builder. Note that except for "Participant Development" and "Community Strengthening," the Issue Areas in the PM Builder correspond to the Issue Areas listed in eGrants.

❑ **SERVICE CATEGORY:** Select a Service Category from the drop down menu in eGrants.

❑ **TOTAL #'s:** In eGrants, enter the total numbers of volunteer stations, volunteers, and number of people to be served in the spaces provided.

❑ **NEED (COMMUNITY NEED):** Complete this section. Did you include the following in your 1-2 paragraph description of the community need? If no, add the information.

| | **Yes** | **No** |
|---|---|---|
| Did you include the name of the community served? | ❑ | ❑ |
| Is the priority issue or problem that your service will address clearly described? | ❑ | ❑ |
| Did you include relevant characteristics of the community served (e.g. number of children with incarcerated parents), including who is being affected by the identified problem or unmet need? | ❑ | ❑ |
| Did you cite a reliable source that documents the issue or problem at the community/county level? | ❑ | ❑ |

> Tip: Citing sources for the need: A reliable source is one that is research-based, current, and reputable. Avoid using only sources that are based solely on anecdotes, a small amount of data, or that are biased.

☑ **SERVICE ACTIVITY DESCRIPTION**: Selected in PM Builder, but you will need to elaborate on the statement.

❑ **Add your program's activity details.** Complete this section. In eGrants, you will put this information in the "Service Activities" text box. Did you include the following in your description of the service activity? If no, add the information.

| | Yes | No |
|---|---|---|
| Is it clear exactly what volunteers will be doing to address the community need? | ❑ | ❑ |
| Is it stated how often and for how long volunteers will perform the activity? | ❑ | ❑ |
| Is the name and type of organization through which the volunteers provide service identified? | ❑ | ❑ |
| 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 community need identified by the program? | ❑ | ❑ |

TIP: Describing your service activity: Stating that volunteers will "assist" does not describe *how* the activity operates. W*hat* will volunteers be doing in this activity? *How* will volunteers achieve the expected results?
**Example**: "Fifty-five Foster Grandparents will provide one-on-one tutoring in reading to 110 teacher-identified, third-grade students at Clarksville Elementary School for 45 minutes in the classroom one afternoon per week for 12 weeks."

❑ **ANTICIPATED INPUT:** In eGrants, complete this section of your work plan. Did you include the following in your description? If no, add the information.

| | Yes | No |
|---|---|---|
| The number of Senior Corps volunteers participating in this activity? | ❑ | ❑ |
| The total hours of service the volunteers will provide? | ❑ | ❑ |
| Any training that will be provided to your Senior Corps volunteers, including general training topics, who will provide the training, and approximately how many hours of training volunteers will receive? | ❑ | ❑ |
| Any important material resources to be expended on the activity and who will provide them (e.g. vehicles for a transportation program)? | ❑ | ❑ |

## ANTICIPATED ACCOMPLISHMENTS/OUTPUTS

The selection you made in the PM Builder under "Output" is your output statement (description) and indicator. In your work plan in eGrants, you will need to complete the output section by adding planned period of accomplishment, target, how measured, and data collection information.

☑ **Output Result Statement (Description)**: Selected in 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? | ❑ | ❑ |

❑ **Planned Period of Accomplishment**

| | Yes | No |
|---|---|---|
| Did you identify the month and year you expect to have this output accomplished? | ❑ | ❑ |

☑ **Indicator**: Selected in 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 define the "dosage" for the output (i.e. how much service a person receives). 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*" defines the minimum dosage of service you expect beneficiaries to receive. | ❑ | ❑ |

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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 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.

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❑ **Target Number:** In eGrants, enter a target number and indicate whether this number is an integer or a percentage. *We recommend that you also develop a complete target statement,* label the statement "target", and add it to the output results statement (description) text box. In your 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 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? | ❑ | ❑ |

❑ **How Measured**: In eGrants, this is a simple drop-down menu. Select the method that best fits your output data collection process.

❑ **Description of Data Collection Process or Measurement Process:** Briefly describe your data collection process for the output, including the name of the instrument you will use. 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 list any 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.

## ANTICIPATED IMPACT/OUTCOME

You selected most of the outcome section in the PM Builder, but you may want to revise or expand on the PM Builder selections for your work plan. You will also need to add planned period of accomplishment, a target, how measured, and a description of data collection.

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

| | Yes | No |
|---|---|---|
| Are the recipients of the change 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? | ❑ | ❑ |
| Does the outcome flow logically from the activity? Will it occur because of this activity? | ❑ | ❑ |

❑ **Planned Period of Accomplishment**

| | Yes | No |
|---|---|---|
| Did you identify the month and year you expect to have this outcome accomplished? | ❑ | ❑ |

> Tip: Use a logic model: Developing a logic model is another way 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/sc-toolkit) and other helpful materials at the Resource Center (http://nationalserviceresources.org/star/sc-logic).

☑ **Indicator**. Selected in the PM Builder. You may want to expand or revise the indicator that you selected. 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 condition about the 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 frail elderly who receive at least 40 hours of service (visits?) will show…*(the expected outcome)".* | ❑ | ❑ |

❑ **Target Number:** In eGrants, enter a target number and indicate whether this number is an integer or a percentage. *We recommend that you also develop a complete target statement,* label the statement "target", and add it to the outcome results statement (description) text box. In your statement, consider:

| | Yes | No |
|---|---|---|
| Does the target respond specifically to your outcome indicator and not something else? | ❑ | ❑ |
| Does the target statement identify:<br>• who or what will change;<br>• the specific change that will occur;<br>• the amount of change that will occur; and<br>• 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 an annual numerical achievement? | ❑ | ❑ |
| Is the target realistic, given time, resources, and the service activity? | ❑ | ❑ |

> TIP: Save time later by thinking through your target now: Even though eGrants will only ask for a number for the target, it is to your benefit to write a complete target statement for your own reference. The statement will clarify the data you need to collect and how to analyze it, and keep you on topic when you report the results later.

❑ **How Measured**. In eGrants, this is a simple drop-down menu. Select the method that best fits your output data collection process.

❑ **Description of Data Collection Process or Measurement Process:**

☑ Data Source**:** Selected from PM Builder

☑ Instrument type**:** Selected from PM Builder

Under "Description of data collection process…", briefly describe your data collection process for the outcome, including the name of the instrument you will use. 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 outcome.) | ❑ | ❑ |
| 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? | ❑ | ❑ |

> 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 Senior Corps toolkits, tutorials, work plan library, and other materials in the Project STAR area of The Resource Center: http://nationalserviceresources.org/star/star.

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