

## **Script for AmeriCorps Tutorial “Reporting Performance Measurement Results”**

### **Slide 1: Introduction**

Welcome to this tutorial on reporting performance measurement results. This will be helpful to program directors who would like tips for clearly presenting results in a report. This tutorial does not cover the specific reporting requirements of each state commission. Contact your state commission for information on how to complete progress reports and when to submit them.

This tutorial moves at your own pace. To advance to the next slide, click the "forward" symbol on the settings at the bottom of the slide at any time.

### **Slide 2: Introduction (cont.)**

Supplementary materials for this tutorial can be downloaded from the web page where you found this tutorial, including a copy of the reporting template and the examples we will be looking at. For additional assistance, contact Project STAR by phone or email, or check out our other resources on the Resource Center website.

### **Slide 3: Agenda**

This tutorial will focus on reporting, and give you tips and examples for developing clear and complete reporting statements. This tutorial does not cover basic performance measurement terms and requirements. For more information on those topics, review one of the other tutorials in this series or the “AmeriCorps Program Applicant Performance Measurement Toolkit” in the Project STAR section of the Resource Center.

This tutorial covers:

- The purposes of and uses for reporting performance measurement results.
- Elements of a well-written progress report, including describing service activities and the anticipated results, describing how progress was measured, and describing actual results.
- We will also give you some additional reporting tips.

### **Slide 4: Purpose of Reporting PM Results**

Let’s start with why it is important to report performance measurement or “PM” results. Remember, you are responsible for two deliverables in connection with performance measurement requirements: the performance measurement worksheets, and progress reports that include performance measurement results.

- Reporting results documents what you've accomplished in terms of actual benefits to the community. It enhances accountability to stakeholders, including funders, staff, volunteers, clients, and other people in the community who have an interest in the services you provide.
- Reporting results helps make the case for continued funding and community support.
- Reporting results clarifies how your program strategies and activities contributed to achieving results. It tells your story.
- And, reports provide useful data for making decisions on adjustments you may want to make to improve your program.

### **Slide 5: Turning Results into a Report**

Let's talk about how to report performance measurement results. For starters, you'll need the results of your data analysis and the original performance measurement worksheet, like the one shown here. This is a children's health insurance awareness and enrollment program.

### **Slide 6: Turning Results into a Report (cont.)**

Your performance measurement worksheet is the basis for your report and contains much of the information you will need. For example, in this section of the worksheet where you described how you would achieve the results, you can use this information to explain the activities your members performed when your report. In this example, the AmeriCorps members are conducting presentations on the children's health insurance program to groups of parents at various locations in the community. You can roll your mouse over the text to read the description.

### **Slide 7: Turning Results into a Report (cont.)**

This is the next section of the performance measure worksheet where you laid out your anticipated results and how you would measure them. Note that for each result – output, intermediate outcome, and end outcome - you would have included a result statement, explaining what you expected to achieve; an indicator, describing how specifically you were going to measure progress; a description of your target with the actual number or percent; and the instrument you planned to use to measure the result.

### **Slide 8: Turning Results into a Report (cont.)**

Now, let's consider what your reader needs to know to understand your performance measurement results. First, explain the service activities that actually occurred. Next, for each performance measure, remind the reader of the anticipated result; explain how you measured the result, including the methods and tools you used; and, report your actual results to date. In particular, indicate whether or not you met the target.

### **Slide 9: Turning Results into a Report (cont.)**

For each of those areas, you can look at information in your performance measure worksheet as a guide. As we noted, you described your service activity in this section titled, "Briefly describe how you will achieve this result."

### **Slide 10: Turning Results into a Report (cont.)**

For each performance measure you report on, look at the result statement in your worksheet to describe what you hoped to achieve, your anticipated result. As you talk about method, or how you measured the result, look to your indicator and instrument, as laid out in your worksheet. When you report the actual result, refer to the target description in your worksheet.

### **Slide 11: Reporting Template**

Project STAR has developed an optional template to help you organize reporting information. Remember, you will want to check with your state commission with respect to their reporting requirement. Many reporting systems provide a textbox where you can report results. This template is available from Project STAR in a Word document. You can fill in a response for each item in the template and then copy-and-paste the text into your progress report.

In the first section, describe the service activity. In the second section, reiterate the anticipated result and indicator, and describe the method you used. In the third section, present your actual results and state whether or not you met the target. On the next set of slides, we will take a closer look at each of these sections.

### **Slide 12: Service Activity**

First, let's look at reporting the service activity. Refer to your worksheet, and provide a brief description of the actual service activity being measured, including how many AmeriCorps members participated and who the beneficiaries were. If there were significant differences, be sure to explain why things were done differently.

### **Slide 13: Measuring the Performance Measure: Anticipated Result and Target**

Now let's look at Section II. First, indicate whether this result is an output, intermediate outcome, or end outcome. Next, describe your anticipated result. You can do this by restating the original performance measure result statement from your worksheet and including the anticipated target number or percent. In addition, restate your indicator from the worksheet; this tells the reader what you measured to determine whether there was progress toward the anticipated result.

### **Slide 14: Measuring the Performance Measure: Method**

In this next section, method, describe how you measured progress. This information is necessary to help the reader understand how you obtained the results you are going to describe.

- Provide the name or title of the instrument you used to measure the result. For instruments that measure outcomes, indicate if they were pre/post or post-only measures.
- Identify who administered the instrument and who completed it.
- Describe when and how often data were collected. If you have not started to collect data, state when this will begin and when you anticipate data collection will be complete.
- Describe how many instruments were administered and how many have been collected.
- If data were not collected as planned, explain what you did differently and why.

### **Slide 15: Performance Measurement Results**

In the last section, describe your results and indicate whether or not you met the target. You can do this simply by restating your target statement from your performance measurement worksheet but use actual results rather than anticipated numbers. If you are comparing pre and post data to demonstrate that a change has occurred, be sure to give those results.

State explicitly whether or not you met the target. If you did not meet the target, explain why. For example, your program may have experienced unexpected developments or obstacles, or the measurement tool or method did not work for you. Explain how this problem will be addressed going forward. In the next set of slides we will go through an example of the completed reporting template.

### **Slide 16: Service Activity Example**

This example involves a program that seeks to increase health insurance access for children by conducting informational presentations to low-income families. The first section of the report, the service activity description, summarizes the actual activity and notes discrepancies from what was originally planned.

### **Slide 17: Performance Measure (Output): Anticipated Result and Target Example**

The next section describes the anticipated result. In this case we are looking at an output performance measure and the program has stated that. Next, they restated the anticipated result and the target: *By the end of the program year, at least 800 parents and guardians will participate in training sessions to learn about CHIP and enroll their children in the program.* They also reminded the reader what specifically was measured, or the indicator: *The number of parents and guardians who attended the sessions.*

### **Slide 18: Performance Measure (Output): Method Example**

Next, they described how the outputs were measured. The instrument used was the CHIP Attendance Roster, which tracked the numbers of attendees, but also collected information so the program could follow up with them. The instrument was administered by AmeriCorps members to the parents and guardians who were attending, and it was collected at the beginning of each session. Four Rosters were circulated at each session and almost all attendees completed it. In this case, the program did a head count as well and did not rely solely on the roster. Everything went fairly smoothly and the data were collected as planned. However, the program notes that a handful of attendees did not put their names on the roster.

### **Slide 19: Performance Measurement Results (Output) Example**

In the final section, the program explains the actual results in relation to the original target: *Over the program year, 744 parents and guardians participated in training sessions to learn about the Children's Health Insurance Program.* The program also explicitly states whether they met the target – this time, they did not - and offers an explanation for why they did not meet the target and what they intend to do about it.

### **Slide 20: Performance Measure (Outcome): Anticipated Result and Target Example**

Now let's look at reporting for another result, this time an outcome for the same service activity. First, the program notes that this is an intermediate outcome. Next, they restated the anticipated result with the target: *By the end of the program year, at least 70% of parents and guardians surveyed who submitted application forms will be approved to receive healthcare benefits through the Children's Health Insurance Program.* Next, they let the reader know what specifically was measured, or the indicator: *The percent of a sample of attendees surveyed who were approved to receive benefits.*

### **Slide 21: Performance Measure (Outcome): Method Example**

This next section describes the method. For this outcome, the instrument used was a Follow-up Telephone Survey and it was a post instrument; that is, data were only collected one time, after the activity. AmeriCorps members administered the instrument to attendees. They interviewed the attendees. The program could not call all 700 parents and guardians to follow up, so they pulled a sample of 25% of the attendees, or 175 of 700, and then they explained in the report how they chose the sample: the sample was obtained by choosing every fourth name from the list of all attendees. When and how often were data collected? Telephone interviews were conducted within 45 days of the session. 105 of the 175 parents and guardians sampled completed an interview, which is 60% of the sample - a pretty good response rate. Data were collected as planned although not everyone was available or willing to complete a telephone survey.

### **Slide 22: Performance Measurement Results (Outcome) Example**

Last, the program describes the actual results with the target: *By the end of the program year, 86% (or 90 of 105) parents and guardians surveyed, from a sample representing 25% of the attendees, were approved to receive healthcare benefits for their children in the CHIP program.* And the program explicitly states that they met the target, using a clear and complete statement highlighting their success.

### **Slide 23: What to Report When You Didn't Meet the Target**

Now that we have seen a couple of reporting examples, let's consider some additional reporting tips. The first tip has to do with what to say when you did not meet the target. First, don't avoid it! Missing a target does not necessarily mean your service activity was not effective, especially if you came close to meeting the target. However, you still need explain why you missed the target and propose a remedy for the situation. Reasons for missing a target might be that:

- The target was unrealistically high;
- Challenges were encountered with placing AmeriCorps members in the service activity;
- Other difficulties were encountered with service delivery;
- Performance measurement instruments were not well-designed;
- Or not enough data were collected to get an accurate reading of the results.

### **Slide 24: What to Report Before Results Become Available**

Another common issue is what to report when you don't have results yet. Suppose your mid-year report is due but you are not scheduled to collect posttest data for another two months. Luckily, there is always something to report! You can inform the reader about what have done so far and what you're planning to do to collect final data. These activities may include developing and pilot testing instruments and data collection procedures, introducing instruments to site coordinators, or training data collectors. In particular, if you have collected pretest data, be sure to analyze these data and report your baseline results. This not only shows the reader that you're following through on data collection tasks, it also provides you with useful information midway through the year to gauge progress. You can also describe any data collection challenges you are facing and describe how you are addressing these challenges to ensure you have results by the end of the year. Last, you can report when you plan to finish collecting data, and whether you are on track to meet your target.

### **Slide 25: Last Few Tips on Reporting**

Here are a few more general tips for writing good reports:

- Give yourself plenty of time to write the progress report. Write a complete first draft, get feedback from a colleague whose opinion you trust, and revise the draft report before submitting it.
- Keep all performance measurement results and other data together in one easily accessible location. This material should be at your fingertips when it is time to

write the report. This may include a combination of electronic files and paper copies.

- If you are filling out a form, complete every section or field. Do not leave anything blank. The reader will not know if a section was left blank by choice or because you forgot to fill it in. If you believe a section is not applicable to your program, then write a brief explanation why.
- Include numbers and other concrete information in reports whenever possible. If the original performance measure target is a number, then report a number; if the original target is a percentage, then report a percentage. But when reporting a percentage, always include the raw numbers that were used to calculate the percentage. Including raw numbers provides context to the report and tells the reader how much data you collected.
- Report the return rate for surveys. The return rate is the number of completed instruments that were returned compared to the number of blank instruments originally distributed.

### **Slide 26: Last Few Tips on Reporting (cont.)**

Always explain discrepancies in what was planned and what actually happened. Don't make the reader guess why fewer people received services than planned, or why no one was given a pre-survey. There may be a very good reason for changing the plan, but your reader won't understand it unless you explain.

And last, look for opportunities to reuse your performance measurement data. Data and results can inform decisions about how to improve your program. You can inspire your volunteers and other local stakeholders by sharing results that show the program's efforts are bearing fruit. Results can also be incorporated into grant applications to show why your program is worth funding. Besides, now that you have written a brilliant report, inquiring minds will want to know!

### **Slide 27: Closing**

This tutorial showed you one way to report your results. Your state commission may require that you use a particular format or outline other than the one we showed you here. Be sure you understand the reporting requirements for your state.

For more information on performance measurement, call Project STAR at 800-548-3656 or email us at [star@jbsinternational.com](mailto:star@jbsinternational.com), or visit our resources online at the Resource Center. This concludes our tutorial on reporting.