

About the Site Performance Management Dashboard

The Public Allies Ally Program Team is pleased to present to you all, National Office staff, Local Site staff, and Operating Partners, our first-ever Performance Management Dashboard for local sites. This Dashboard is meant to be used as a tool for us all to both **manage and support** site operations in our pursuit to deliver the best nonprofit leadership development programming to young adults across the country.

Why Performance Management?

In short, how do we know if we're doing well if we don't measure it!

Over the course of its existence, Public Allies has developed many tools intended to measure program performance – most familiar is the Site Monitoring Tool. As Public Allies has grown and taken on affiliation as our governance structure, we need a comprehensive tool that measures site well-being in all of the areas that effect it: **Management Effectiveness, Financial Sustainability, Community Engagement and Program Quality**. If we are not performing in one or more of these areas, we risk falling short of maximizing our full potential and providing the best experience to our Allies.

As the program proceeds throughout the year, sites we will be able to view this Dashboard and get a measure of how successful our sites are.

How does the Tool Work?

Each element of site effectiveness has a spreadsheet outlining the following:

- Definition of the Performance Element – Poses the questions that help determine what outcomes we must measure to determine success within the element.
 - o Example: Management Effectiveness – What must we excel at? Do we have the capacity to achieve our goals? How will we learn and improve?
- Outcomes – What are the ways we will know that the site is operating well, either through the administration or the implementation of the program?
- Indicator – What is the indicator that the outcome is being met?
- Meets, Exceeds & Falls Short of Expectation – Provides an expression of the how the site will be measured to have met the indicator (and thus the outcome). Typically tied to a benchmark that has been set in another document (such as the annual program baselines & standards, Operating Partner memorandum of understanding and cooperative agreements).
- Score – Records if a site has met, exceeded or fallen short of the expectations set, as determined by the party responsible for benchmarking that performance element.
- Measurement Tool – The tool that provides the information used to determine the site's score.
- Party Responsible for Benchmarking – The person (usually at the National Office) that monitors the site's performance in a particular performance element and gathers the information used to determine the site's score.
- Reference for Benchmark – A document that is provided to (and typically mutually agreed upon with the site) that outlines performance standards. These documents are updated regularly.

As each indicator is scored, the site's "total" is added up at the bottom of the page. This total is a numerical indication of the site's performance with that dashboard element.

What does the Dashboard Summary do?

The Dashboard Summary spreadsheet is an at-a-glance view of site's performance in all performance elements. Scores are pulled from each of the individual performance element spreadsheets. A total score for all elements is also given on this page.

How should I interpret my scores?

We will not be judging scores based on rigid ranges. The scores are meant to be an indicator, and not prescriptive assessment of how well a site does. When looking at the scores, use the following guidelines:

- A site with approximately half of the possible total points is generally meeting expectations for that performance element.
- A site with approximately $\frac{3}{4}$ of the possible total points is generally performing above expectations for that performance element.
- A site with approximately $\frac{1}{4}$ of the possible total points is generally performing below expectations for that performance element.

What if I have an issue with what's indicated here?

If there is information contained in this document that you believe is a misrepresentation of your site's performance on an indicator, you should address this issue with the person indicated as the "Party Responsible for Benchmarking," -- preferably in writing. In raising this issue, please specifically indicate which performance element, outcome, and indicator you would like reviewed. Also indicate what you believe the score should reflect. If possible, also refer to the measurement tool or other documentation that supports your assertion.

Site Information

Site Name	Sample
Site Executive Director	John Doesey
Regional Director	Eliza Halsey
Program Year	2006-07
Site Operating Partner	ABC University



Management Effectiveness – What must we excel at? Do we have the capacity to achieve our goals? How will we learn and improve?

Outcomes	Indicator	Meets Expectation	Exceeds Expectation	Falls Short of Expectation	Score	Measurement Tool	Party Responsible for Benchmarking	Reference for Benchmark
Sites practice goal setting and performance management (Integrity)	The site sets annual goals to improve the quality of program delivery and achievement of mission	Annual site goals are set by September 1 st of every year.	E – Annual goals are set & include a mixture of normative and stretch goals.	FS – Annual goals are not set;		<i>Currently not measured in a tool</i>	Regional Directors	<i>No Current Reference -- TBD</i>
	Goals are met	Sites meet 75% of their annual goals. For goals	Sites meet more than 75% of their annual goals. For	Sites meet less than 75% of their annual goals. Little		<i>Currently not measured in a tool</i>	Regional Directors	<i>No Current Reference -- TBD</i>
Site staff are managed well and participate in individual performance management process (Integrity & ABCD)	Supervisors use a staff performance management process and utilize 360, Staff PISD, and IDP tools to set individual goals and measure progress	Supervisors met with each staff member four times over the course of the fiscal year	Supervisors followed up between meetings and held additional sessions utilizing coaching and further tools	Supervisors met with each staff member less than four times over the course of the fiscal year		Site Monitoring Tool Question: Do SDs met with each staff four times per year? Is there follow-up?	APT	PMP Documents
	Rewards are conferred for meeting goals or performance improvement takes place	Supervisors provided a reward or recommendation of PIP after each of four meetings	Supervisors managed a comprehensive assignment or reward and follow up plan	Supervisors did not reward good behavior and did not recommend improvements regularly		Site Monitoring Tool Question: Is there a measurable action taken after each of four meetings with each staff member?	APT	PMP Documents
	Staff are satisfied with their jobs	Staff indicate a "4" average on the Satisfaction Monkey	Staff indicate a "5" average on the Satisfaction Monkey	Staff indicate less than a "4" average on the Satisfaction Monkey		Satisfaction Monkey	HR	PMP Documents
	Staff participate in non-PA sponsored opportunities for personal and professional development	Each person attends 1 event	Each person attends 2 events	Not each person attends at least 1 event		Site Monitoring Tool Question: How many non-PA sponsored learning events did each staff attend?	APT	PMP Documents
	Staff are offered & participate in PA-sponsored opportunities for personal and professional development	Each person attends 5 events	Each person attends 15 events	Not each person attends at least 5 events		PAU Attendance Tracker	LP	PMP Documents
Public Allies sites participate in national networks and share innovations and lessons (Collaboration)	Sites participate in virtual meetings	Each site is represented in each virtual or face-to-face meeting opportunity	Staff volunteer for & participate in the planning and delivery of virtual meetings	Staff are not present or do not participate in virtual meetings regularly		PAU Review Tool	Director of Training & Learning	Operating Partner Memorandum of Understanding
	Sites participate in annual all staff retreat & mid-year institutes	100% of site staff participate in the annual all-staff retreat and mid-year	Staff volunteer for & participate in the planning and delivery of ASR & Mid-	Staff are not present or do not participate in the staff gatherings		PAU Review Tool	Director of Training & Learning	Operating Partner Memorandum of Understanding
	Sites contribute to the learning of others and innovation of the program	Site shares a template with other members of PA network	Site staff deliver support to one or more members of the PA network	Site staff have no contact with other members of PA network		<i>Currently not measured in a tool</i>	Regional Directors	<i>No Current Reference -- TBD</i>
Operating Partnerships are effective and valued	Operating Partners evaluated fulfilling partnership agreement	Most partnership standards met; may have some minor areas of concern to address	100% of partnership standards met or exceeded	Some partnership standards met; some areas of serious concern identified		Operating Partnership Review	Vice President, Ally Programs	Operating Partner Memorandum of Understanding
	Operating Partners indicate they were satisfied overall with their experience with the Public Allies program	Operating Partner indicates they were satisfied overall with their Public Allies experience.		Operating Partner indicates they were less than satisfied overall with their Public Allies experience.		Operating Partnership Review	Vice President, Ally Programs	<i>No Current Reference -- TBD</i>

Public Allies site offices are well-managed	Sites have office systems that promote effective and efficient operations	Sites have clear office systems that staff are oriented to	Sites have office management systems that are documented (in writing) and provided to staff	Sites have no office management systems		<i>Currently not measured in a tool</i>	Regional Directors	<i>No Current Reference -- TBD</i>
Total "Management Effectiveness"					0 out of possible 24			

Meets Expectation = 1 point

Exceeds Expectation = 2 points

Falls Short of Expectation = 0 points



Program Quality – How do we want our customers to perceive us? How do we achieve quality, brand, and product leadership?

Outcomes	Indicator	Meets Expectation	Exceeds Expectation	Falls Short of Expectation	Score	Measurement Tool	Party Responsible for Benchmarking	Reference for Benchmark
Allies are satisfied with their experience	Public Allies graduates indicate they were satisfied with their experience in the program	85% of Public Allies graduates indicate satisfaction with their experience in Public Allies program	Over 95% of Allies indicate satisfaction with their experience	Less than 95% of Allies indicate satisfaction with their experience		Ally year-end survey results <i>(To be added)</i>	Prgm Impr Officer	<i>No Current Reference -- TBD</i>
	Public Allies graduates indicate that their Ally experience adequately prepared them for the next stage of their career and/or education	85% of Public Allies graduates surveyed indicate that Public Allies adequately prepared them for the next stage of their education or career.	Over 95% of graduates indicate they were adequately prepared for the next stage of their education or career	Less than 95% of graduates indicate they were adequately prepared for the next stage of their education or career		Alumni Relations annual survey	Prgm Impr Officer	<i>No Current Reference -- TBD</i>
Partner Organization Satisfaction (Continuous Learning, Community Participation)	Partner Organizations indicate they were satisfied overall with their experience with the Public Allies program	85% of Partner Organizations indicate they were satisfied overall with their Public Allies experience.	Over 85% of Partner Organizations indicate they were satisfied overall with their Public Allies experience.	Less than 85% of Partner Organizations indicate they were satisfied overall with their Public Allies experience.		PO year-end survey results <i>(To be added)</i>	W -- Prgm Impr Officer	<i>No Current Reference -- TBD</i>
Site achieves Public Allies baselines and standards (Continuous Learning, Integrity)	Sites evaluated as having "fulfilled" the baselines & standards	Most baselines & standards met; may have some minor areas of concern to address	100% of baselines & standards met or exceeded	Some baselines & standards met; some areas of serious concern identified		Annual Baselines & Standards Review	Regional Directors	Operating Partner Memorandum of Understanding
	Sites work to improve their compliance with baselines & standards	50% of the previous year's noncompliant baselines & standards are met	Over 50% of the previous year's noncompliant baselines & standards are met	Less than 50% of the previous year's noncompliant baselines & standards are met		Annual Baselines & Standards Review	Regional Directors	2006-07 Ally Program Baselines & Standards
AmeriCorps Performance Standards Achieved (Integrity, Continuous Learning)	Sites evaluated as having "met" AmeriCorps performance standards	Most performance standards met; some exceeded; may have fallen short in 1-2 areas	100% of performance measures met or exceeded	Some performance measurements met; fell short in 3 or more of performance measurements		Annual Baselines & Standards Review	Regional Directors	2006-07 Ally Program Baselines & Standards
PISD entries are of the highest quality and survey completion rate is high (Integrity, Continuous Learning)	PISD entries and approvals are of the highest quality, leading to more informative evaluation	Most PISDs are complete and submitted on a timely basis; may have some minor areas of concern to address	All PISDs complete and submitted on timely basis; PISDs are noted as exceptional sources of information	Many PISDs incomplete and submitted well after deadlines		PISD & WBRS Review	Regional Directors or Prgm Impr Officer	2006-07 Ally Program Baselines & Standards
	All surveys have a high completion rate	100% of Allies complete & return surveys		Less than 100% of Allies complete and return surveys		Annual Baselines & Standards Review	Prgm Impr Officer	2006-07 Ally Program Baselines & Standards
	Partner Organization surveys have a high completion rate	80% Partner Organizations complete & return surveys	Over 80% Partner Organizations complete & return surveys	Less than 80% Partner Organizations complete & return surveys		Annual Baselines & Standards Review	Prgm Impr Officer	2006-07 Ally Program Baselines & Standards
Total "Program Quality"						0 out of possible 18		

Meets Expectation = 1 point
 Exceeds Expectation = 2 points
 Falls Short of Expectation = 0 points



Financial Sustainability – How are we achieving efficiency and transparency in our financial management? Are our fiscal and fundraising activities carried out with integrity? Are we financially stable?

Outcomes	Indicator	Meets Expectation	Exceeds Expectation	Falls Short of Expectation	Score	Measurement Tool	Party Responsible for Benchmarking	Reference for Benchmark
The Ally Program is cost effective (Integrity, Community Participation)	Site meets the agreed upon match to the AmeriCorps grant	Site meets the agreed upon match as indicated in the AmeriCorps grant.	Site exceeds the agreed upon match as indicated in the AmeriCorps grant.	Site falls short of the agreed upon match as indicated in the AmeriCorps grant.		AmeriCorps Budgets, AmeriCorps Financial Status Reports	Vice President, Finance & Admin	Operating Partner Cooperative Agreement
Public Allies sites are financially stable	Site raises non-AmeriCorps funds sufficient to operate a successful program	Site meets annual goal set forth at beginning of year	Site raises a surplus	Site falls short of fundraising benchmarks		<i>Currently not measured in a tool</i>		<i>No Current Reference -- TBD</i>
	Sites have a sustainable revenue base from diverse sources	No funding stream represents more than 80% of total non-AmeriCorps funding	No funding stream represents more than 50% of total non-AmeriCorps funding	More than 80% of non-AmeriCorps revenue comes from one type of funding stream		<i>Currently not measured in a tool</i>		<i>No Current Reference -- TBD</i>
Public Allies sites demonstrate accurate & timely financial reporting	Site's Periodic Expense Reports and Financial Status Reports submittals	PER and FSRs submitted within 20 days after end of quarter	PER & FSR submitted monthly	PER & FSR submitted late		WBRS	Vice President, Finance & Admin	Operating Partner Cooperative Agreement
	Public Allies & AmeriCorps accounting standards "met"	Most performance standards met; some exceeded; may have fallen short in 1-2 areas	100% of performance measures met or exceeded	Some performance measurements met; fell short in 3 or more of performance measurements		AmeriCorps Budgets/Financial Review/Desk Audit?	Vice President, Finance & Admin	<i>No Current Reference -- TBD</i>
Total "Financial Sustainability"					0 out of possible 10			

Meets Expectation = 1 point
 Exceeds Expectation = 2 points
 Falls Short of Expectation = 0 points



Community Engagement – How are we engaging participants, partners and champions in our work?

Outcomes	Indicator	Meets Expectation	Exceeds Expectation	Falls Short of Expectation	Score	Measurement Tool	Party Responsible for Benchmarking	Reference for Benchmark
Program participant applicants (both Allies and Partner Organizations) are substantial and diverse.	Sites receive enough Ally applications to select a class that fills all available slots meets diversity goals	Site receive twice as many Ally applications as available slots	Site receives more than twice as many Ally applications as available slots	Site receives less than twice as many Ally applications as available slots	Meets Expectation	Site Monitoring Tool & Annual Baselines & Standards Review	Regional Directors	2006-07 Ally Program Baselines & Standards
		Under-represented racial and ethnic groups are over-represented in the final ally class	Under-represented racial & ethnic groups make the majority of the final Ally class	Under-represented racial & ethnic minorities are under-represented in the final Ally class.	Exceeds Expectation	Site Monitoring Tool & Annual Baselines & Standards Review	Regional Directors	2006-07 Ally Program Baselines & Standards
	Sites receive enough Partner Organization applications to select a class that fills all available slots meets diversity goals	Sites receive 1¼ as many Ally applications as there are available slots	Site receives more than 1¼ as many Ally applications as available slots	Site receives less than 1¼ as many Ally applications as available slots	Falls Short of Expectation	Site Monitoring Tool & Annual Baselines & Standards Review	Regional Directors	2006-07 Ally Program Baselines & Standards
		Partner Organizations include a mix of new/returned, small/large, and faith-based organizations		No new, small or faith-based organizations are represented in the Partner Organization pool.	Meets Expectation	Site Monitoring Tool & Annual Baselines & Standards Review	Regional Directors	2006-07 Ally Program Baselines & Standards
Community leaders enhance our Ally leadership training and curriculum	Community trainers lead most of the required curriculum trainings	60% of Ally trainings are led by a local community leader	Over 60% of the Ally trainings are led by a local community leader	Less than 60% of the Ally trainings are led by a local community leader	Meets Expectation	Site Monitoring Tool Question: What is the percentage of trainers from the community?	APT	2007-08 Ally Program Baselines & Standards
	The Training & Learning program is effective	80% of Allies report that the Training & Learning program increased their ability to meet Ally Outcomes	Over 80% of Allies report that the Training & Learning program increased their ability to meet Ally Outcomes	Less than 80% of Allies report that the Training & Learning program increased their ability to meet Ally Outcomes	Exceeds Expectation	Ally Year-End Survey	APT	2006-07 Ally Program Baselines & Standards
Local leaders are engaged in the site's Local Advisory Board	The local Advisory Board assists the program with strategy, community outreach and fund development	The site has a Local Advisory Board that meets regularly	The Local Advisory Board has a strategic plan and fund development goals that it works to meet	The site has no Advisory Board or the Advisory Board meets irregularly	Falls Short of Expectation	Currently not measured in a tool	APT	Operating Partner Memorandum of Understanding
Local Elected Officials are engaged and support the program	Local elected officials are made aware of the program and are engaged when possible	Site reaches out to the offices of their US Senators and US Representatives once a year to share information about the program	Site has substantial contact with their US Senators and US Representatives (either a visit to their offices or the Official's visit to the PA site) two times or more during the year	Sites perform no outreach to US Senators and US Representatives	Meets Expectation	Operating Partnership Review	Vice President, Ally Programs	Operating Partner Memorandum of Understanding
Relationships with State Commission and AmeriCorps groups are supportive	Site seeks to collaborate with other AmeriCorps programs	Site works with other AmeriCorps programs on one project during the program year	Site works with other AmeriCorps programs on a long-term or on-going project	Site has no contact with other local AmeriCorps programs during the program year	Exceeds Expectation	Operating Partnership Review	Vice President, Ally Programs	Operating Partner Memorandum of Understanding
	Site participates in statewide AmeriCorps events and activities	Site meets with State Commission staff once during the program year	Site participates in AmeriCorps statewide events	Site has no contact with State Commission	Meets Expectation	Operating Partnership Review	Vice President, Ally Programs	Operating Partner Memorandum of Understanding
<i>Alumni Engagement?</i>	<i>Metrics for Alumni Engagement to be developed</i>							
Total "Community Engagement"						10 out of possible 22		

Meets Expectation = 1 point
Exceeds Expectation = 2 points

Falls Short of Expectation = 0 points

PUBLIC ALLIES PERFORMANCE MANAGEMENT DASHBOARD SUMMARY

Site Name Sample
Site Executive Director John Doesey
Program Year 2006-07

Site Operating Partner ABC University
Regional Director Eliza Halsey



0 Financial Sustainability Benchmarks have been Met
0 Financial Sustainability Benchmarks have been Exceeded
0 Financial Sustainability Benchmarks have not been Met

Score 0 out of possible 10



4 Community Engagement Benchmarks have been Met
3 Community Engagement Benchmarks have been Exceeded
2 Community Engagement Benchmarks have not been Met

Score 10 out of possible 22



Score 0 out of possible 24



0 Management Effectiveness Benchmarks have been Met
0 Management Effectiveness Benchmarks have been Exceeded
0 Management Effectiveness Benchmarks have not been Met



0 Program Quality Benchmarks have been Met
0 Program Quality Benchmarks have been Exceeded
0 Program Quality Benchmarks have not been Met

Score 0 out of possible 18

Total Score 10 out of possible 78