CIPP

Grantee Guide to Project Performance Measurement

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About This Tool

This Tool was developed as part of the Center to Improve Program and Project Performance (CIPP) operated by Westat for the U.S. Department of Education, Office of Special Education Programs (OSEP). The authors thank the OSEP and Westat staff who provided input.

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Overview of the Center to Improve Program and Project Performance

First formed in 2008, CIPP's overall mission is to advance the rigor and objectivity of evaluations conducted by or for OSEP-funded projects so that the results of these evaluations can be used by projects to improve their performance and used by OSEP for future funding decisions, strategic planning, and program performance measurement.

CIPP provides evaluation support, oversight, and technical assistance (TA) to OSEP projects. CIPP staff work with project and OSEP staff to refine project logic models, and develop and implement evaluations. Based on the evaluation design and plan, CIPP staff have overseen evaluation activities and provided grantee TA, as needed, including selecting samples; developing draft instruments; assisting in new instrument pilots, identifying appropriate data collection and analysis strategies; performing reliability checks; providing accurate descriptions of the methods and valid interpretations of findings; and organizing, reviewing, and editing project evaluation reports. In addition to providing TA to OSEP-funded projects on request, CIPP staff prepare TA products and tools focused on evaluation issues, and deliver presentations on evaluation and performance measurement through webinars and conferences. Finally, CIPP staff also collect and analyze data to support OSEP's discretionary grant programs' annual reporting under the Government Performance and Results Act (*GPRA*).

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IDEAs that Work

Office of Special Education Programs
U.S. Department of Education

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Introduction

Private-sector enterprises, non-profit organizations, Federal and State grant projects, and individuals regularly use quantitative metrics to track, monitor, and report performance. Such metrics are often referred to as **performance measures**. Increasingly, our society is data-driven, making such tracking, monitoring, and reporting a time-consuming, but critical, aspect of work across most organizations. In general, data from performance measures are used for important decision-making, including identifying what works and what does not work and whether programs should be continued. For example, the U.S. Department of Education's (the Department's) Office of Special Education Programs (OSEP) examines data to determine how to improve outcomes for infants, toddlers, children, and youth with disabilities. The stakes are high, so performance measures should be meaningful and help tell the story of how well an effort (e.g., project, program) is progressing toward achieving its overall aims.

This *Grantee Guide to Project Performance Measurement (Guide)* is designed to help projects funded under OSEP's discretionary grant programs develop high-quality project performance measures. These project-specific measures supplement the required *Government Performance and Results Act (GPRA)* measures grantees are required to report to OSEP each year.

In this *Guide*, we present an approach for developing high-quality project performance measures and explain how the *GPRA* and project measures work together to allow for meaningful tracking of program and project performance. We outline a simple, but thorough, five-step process for developing performance measures that:

- supports reviews of documentation relevant to project work;
- helps identify critical activities, outputs, and outcomes associated with the project; and
- guides selection of the best measures of project performance.

The steps provided in this *Guide* can be used to develop performance measures for all types of projects. In addition, this *Guide* can help you examine how the performance measures included in your grant application can align to OSEP's requirements. You will also have the opportunity to consider the measures' usefulness given the current context of your project.

While this *Guide* focuses solely on developing project performance measures, it is important to keep in mind that performance measurement occurs within a larger project plan as well as the overall project evaluation.

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The *Guide* does not delve into evaluation, largely because other CIPP technical assistance (TA) products offer relevant guidance on that topic. (See, for example, Demonstrating Evidence Across the Project Cycle and the Evaluating Special Education Programs: Resource Toolkit, available on the OSEP IDEAs That Work website along with other TA products.) Since performance measurement is a natural component of evaluation, you should include your evaluator in the work of performance measure development and refinement. If, as a result of going through the five-step process, you decide to make changes to your project performance measures, be sure to work with your OSEP Project Officer (PO) to update both your overall project implementation plan and the corresponding evaluation plan, as needed.

Suggestion for Success!

Follow the step-by-step process! Although you are not required to follow this approach and complete all the steps, we encourage you to follow the process through until the end. Members of the CIPP team have used this type of approach to developing measures successfully with approximately 20 Department program offices and grantees during the last five years. In our experience, participants find the process to be valuable and to increase the overall quality of their measures. For example, participants commented on how the process itself helped build a shared understanding across the project team that had not existed before the work, and some even created posters for use as wall art to remind everyone about the focus on the work.

The process is rigorous and results in thorough discussions that can be challenging for teams at times. If you and your team encounter such challenges, view them as a sign that you are doing the right thing! Trust the process and forge ahead. Following the suggested approach will help to ensure that your project's measures are relevant, appropriate, and, most importantly, high-quality indicators of project progress and results

What Are Performance Measures?

The two types of performance measures that grantees should understand — ***GPRA measures***, which are sometimes referred to within OSEP as "program measures," and **project measures** — are explained in Table 1. *GPRA* measures are established by OSEP in conjunction with the Office of Management and Budget (OMB) and the Department's Budget Service, and recipients of Federal grants are required to report on the measures established for the grantor's program each year. *GPRA* data are reported to OMB and Congress annually to provide information about program performance and results. You must develop and refine your project measures to reflect your individual project and its needs. With the support of this guide, you can identify meaningful measures of performance that you can use to track, monitor, and report progress toward achieving your project's outcomes over time.

A portfolio of performance measures. Each year, OSEP grantees are required to report on a set of measures that you can think of as your "portfolio" of performance measures. As you've learned, some of the measures are mandated (*GPRA*), while others — project performance measures — reflect what is important about individual projects and may be required to align with the *GPRA* measures. In the end, this vision of a ***portfolio of performance measures*** can be useful in helping you and your OSEP PO to observe and quantify changes in progress toward achieving program and project outcomes. This portfolio includes OSEP's *GPRA* measures and project measures — both those that are specific to the project and those that are aligned with the *GPRA* measures. The portfolio reflects key points of progress toward achieving the project outcomes and can help identify areas for changes in grant management strategies to support achievement of desired results.

Figure 1. *GPRA Measures and Project Measures Create a Portfolio of Performance Measures*

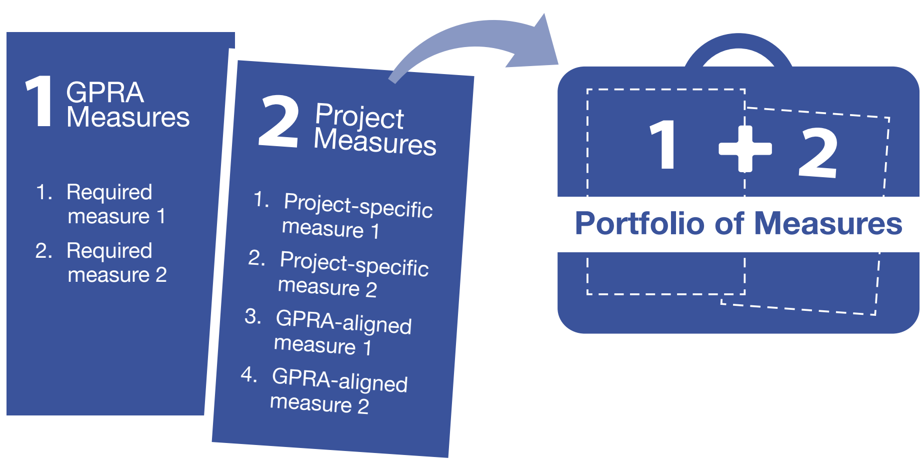

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Table 1. *Types of Performance Measures OSEP Grantees Should Understand*

Type of Performance Measure	Definition and Explanation
GPRA	**Definition** • Measures established for reporting to Congress under the *Government Performance and Results Act (GPRA)*.[1] **Explanation** • In 1993, Congress passed and the President signed *GPRA* into law, which requires Federal programs to report on performance annually to Congress. The law was updated by the *GPRA Modernization Act of 2010*, which further improved Federal agencies' ability to plan, evaluate, and report agency progress. • The Department has identified *GPRA* measures for each grant program,[2] requiring grantees to report annually on progress in relation to those measures of performance. *GPRA* measures relate to key outcomes associated with each grant program. • *GPRA* measures are designed to evaluate overall performance of a program (e.g., Technical Assistance and Dissemination, Parent Information Centers), not individual projects.
Project	**Definition** • Project-specific performance measures, which are included in each approved grant application. **Explanation** • Project performance measures supplement *GPRA* performance measures. Project performance measures are those identified by the grantee as important indicators of progress in relation to the aims of the project itself, and may be required to align with the *GPRA* measures. • Project performance measures are designed to convey specific information about how much change is expected, by who, and when. • Grantees use project measures to describe the performance of their individual projects.

1. U.S. Department of Education, 2017.
2. See Appendix A for a list of the OSEP *GPRA* Measures, by Program.

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Set the Stage for Success

To increase the likelihood that you will end up with high-quality project performance measures:

Create a performance monitoring team

Identify individuals from across the project, including your evaluator, who have the time and capacity to support this effort as part of a team. Charge the team with the responsibility of developing meaningful project performance measures. If possible, recruit key stakeholders, or individuals who may be impacted by project activities, for this opportunity. Your team may also include your OSEP PO.

Assign roles

Identify team members with substantive knowledge of the project to serve in critical roles, such as a team leader to organize meetings and a secretary to maintain and distribute accurate meeting summaries. As part of team formation, assign capable people to fulfill critical roles such as team leader and secretary. The team leader will be responsible for executing team management activities (e.g., leading meetings, facilitating discussions). The secretary will need to record key aspects of discussions and decisions, and share meeting summaries with the team in a timely manner. The team will identify and fill other critical team positions (e.g., task leader) as necessary.

Establish a meeting schedule

Develop a clear meeting schedule that suggests meeting frequency, duration, and anything else that will be important to your team's success. Be sure to consider any "contextual variables" (e.g., an expected winter break or extended absence of a key team member) when creating the plan, and provide guidance up front regarding expectations for participation.

Identify ground rules

Identify suggested ground rules for the work and begin developing the measures. Tell the team that this assignment may require new and innovative thinking. Encourage a team spirit that fosters creative thinking and accepts all ideas in a supportive manner. Ground rules can often help new teams find a style of working together that fosters rapport, avoids one person dominating the conversation, facilitates quick progress, and builds accountability for the work. Keep these ground rules in mind as you follow our suggested approach to developing project measures.

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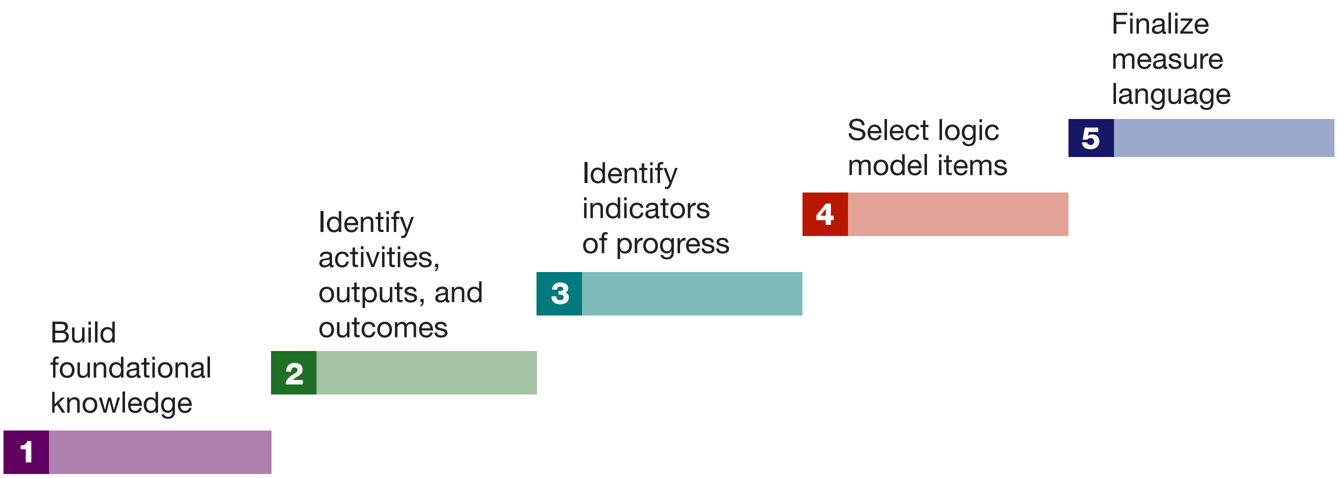
A Five-Step Process for Developing High-Quality Performance Measures

Our step-by-step process for project performance measure development, which is described in detail starting on page 13, can be used by all types of grant projects:[3]

1. Build foundational knowledge;
2. Identify key project activities, outputs, and outcomes;
3. Identify the most critical indicators of progress and results;
4. Select logic model items; and
5. Finalize performance measure language.



Each step includes one or more templates (e.g., suggested table formats) to help you complete the work, and we provide examples within each step. The sample templates are based on a fictional grant project described in a fictional example — the *Advancing Reading Instruction in Special Education (ARISE) Center*. We urge you to read the example before continuing. All templates can be found in Appendix C, and another example related to a fictional *Parent Information and Training Center* can be found in Appendix D. Excel files of the templates are available along with this *Guide* on the OSEP IDEAs That Work website.

3. While we focus on project-level performance measures, you can apply the basic approach outlined here more broadly to other types of measures for other project or program work.

Advancing Reading Instruction in Special Education Center (ARISE Center)

Project Description

Background

The *ARISE Center* is funded under OSEP's Technical Assistance and Dissemination (TA&D) Program. During the 2015-2016 academic year, most states reported a severe shortage of special educators, leaving schools to hire uncertified or under-certified educators to fill these positions. As Sutcher et al. explain, "It is striking that the field that serves the most vulnerable students and, arguably, requires the most wide-ranging teacher knowledge… is increasingly populated by underprepared teachers."[4] All educators, but particularly those who are uncertified or under-certified, can benefit from exposure to best practices in elementary reading instruction. In fact, when educators use evidence-based practices, they increase the likelihood of positive outcomes for their students.[5] This finding is especially important in the area of elementary reading, given the research that reading levels at the end of third grade predict reading levels in high school[6] and ultimately high school graduation rates.[7] Moreover, students with relatively low literacy achievement tend to have more social and behavioral difficulties.[8] However, best practices in elementary reading instruction are typically disseminated using technical jargon in professional journals, which makes it difficult for busy educators to access and contributes to a research-to-practice gap—a term used to describe a situation in which validated practices are not used in educational settings. Although there has been a longstanding recognition of this gap, researchers indicate that it has not yet been reduced.[9]

Purposes

The purposes of the *ARISE Center* are to:

1. Improve the quality of early elementary reading instruction delivered by special educators and their general education counterparts; and
2. Increase reading achievement among elementary students receiving special education services in all areas.

The specific objectives include:

1. Design, develop, and disseminate products highlighting best practices in instruction in elementary reading for students with disabilities;
2. Provide online professional development (PD) in elementary reading to educators working with elementary students with disabilities;
3. Provide universal technical assistance (TA) to educators working with elementary students with disabilities; and
4. Provide targeted and intensive TA to educators working with elementary students with disabilities in selected local education agencies (LEAs) in participating states.

4. 2016, p. 11
5. Cook & Odom, 2013
6. U.S. Department of Education, 1999
7. National Research Council, 1998
8. Miles & Stipek, 2006
9. Cook & Odom, 2013

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The objectives of the *ARISE Center* fall in two major categories: knowledge development (i.e., through the development of the best-practice products and the online professional development sessions) and technical assistance.

Technical assistance will be delivered using a three-tiered model with universal, targeted, and intensive TA activities. Universal TA will include postings on the Center website, social media accounts, and resources disseminated via an email listerv, including the dissemination of the best-practice documents and alerting subscribers to online professional development opportunities. The Center will recruit three SEAs to participate in TA in the next two tiers (i.e., the targeted and intensive levels). From there, each participating SEA will select three LEAs to participate. Altogether, there will be nine LEAs, and special educators in these LEAs will participate in targeted and intensive TA. All special educators in all nine LEAs will participate in targeted TA, while selected special educators will have the additional opportunity to participate in intensive TA. Targeted TA will be delivered via an online community of practice with special educators in participating LEAs. Finally, intensive TA will be delivered in-person and individually with selected educators in participating LEAs. Priority for intensive TA will be given to special educators who are uncertified or under-certified.

OSEP TA&D *GPRA* Measures[10]

- The percentage of States receiving Special Education Technical Assistance and Dissemination services regarding scientifically- or evidence-based practices for infants, toddlers, children, and youth with disabilities that successfully promote the implementation of those practices in school districts and service agencies.
- The percentage of Technical Assistance and Dissemination products and services deemed to be of **high quality** by an independent review panel of experts qualified to review the substantive content of the products and services.
- The percentage of Special Education Technical Assistance and Dissemination products and services deemed by an independent review panel of qualified experts to be of **high relevance** to educational and early intervention policy or practice.
- The percentage of all Special Education Technical Assistance and Dissemination products and services deemed by an independent review panel of qualified experts to be **useful** to improve educational or early intervention policy or practice.
- The cost efficiency of the Special Education Technical Assistance and Dissemination Program as measured by milestones achieved and funds drawn down in a reporting year.
- The percentage of effective evidence-based program models developed by Model Demonstration Projects that are promoted to states and their partners through the TA&D Network.

10. Please note that these are the current (as of June 2018) *GPRA* measures that TA&D grantees are required to report on annually.

LOGIC MODEL

INPUTS	STRATEGIES/ ACTIVITIES	OUTPUTS	OUTCOMES: SHORT-TERM	OUTCOMES: MEDIUM-TERM	OUTCOMES: LONG-TERM
Funding Research Center staff TA providers	Develop and disseminate **best-practice products** Provide online **professional development** Provide **Universal TA:** Website, social media, listserv Provide **Targeted TA**: Community of practice with special educators in participating LEAs Provide **Intensive TA**: In-person and one-on-one TA with selected special educators in participating LEAs	Number of products Number of online PD sessions Number of educators participating in PD sessions Number of website posts, social media posts, emails sent via listserv Number of LEAs and educators participating in targeted TA Number of LEAs and educators participating in intensive TA	Increased awareness of Center resources, PD, and TA among general and special educators and LEA administrators Increased knowledge of best practices for students with disabilities in elementary reading instruction among general and special educators	Increased administrator support for the use of best practices in elementary reading instruction Increased use of best practices for students with disabilities in elementary reading instruction among general and special educators	Improved quality of elementary reading instruction delivered by general and special educators Increased elementary reading achievement among students with disabilities Improved long-term outcomes for students with disabilities

External Factors: Federal policy, state policy, LEA support for time for PD and TA, total hours of PD and TA received, educator skill and capacity, collaboration

5
Finalize measure language
4
Select logic model items
3
Identify indicators of progress
2
Identify activities, outputs, & outcomes
1
Build foundational knowledge

STEP 1

Build Foundational Knowledge

PURPOSE OF
STEP 1

Give the team a thorough understanding of the grant, its goals, and the processes (or mechanisms) through which change is expected to occur, and determine how much change is reasonable to expect and over what time period.

The first step to developing high-quality project performance measures is to have strong foundational knowledge about OSEP program requirements, the funded grant project, its theory of action (or change), and how the improvements or planned changes are expected to occur. For most grantees, as much as a year or more may have passed from the time you submitted your grant application to the time of grant award and your first conversation with your PO about refining project measures. Other project changes may have occurred since the application submission, such as staffing changes upon award.

This step encourages a reflective, informed process that starts with reviewing the guiding literature to determine if any new studies, or other pertinent literature, have emerged that can inform your work. It is an opportunity to delve deeply into the documentation and to get a better understanding of the current context for your project. In the end, everyone on this performance measurement team should have a solid understanding of the documentation supporting the proposed work, as it is the foundation from which performance measures are identified. Further, the guiding literature should help the team determine how much change is reasonable to expect and over what time frame.

Documentation to review includes, but may not be limited to:

- All documentation provided by the OSEP program office related to the grant, including the Federal Register Notice and any *GPRA* performance measure reporting materials.
- All relevant grant project documentation, such as:
  - the grant application,
  - the project logic model and theory of change,
  - goals,
  - research studies or other literature related to the project or its outcomes,
  - the project plan, and
  - the evaluation plan.

As you review the project documentation, pay close attention to details that can help you and your team understand or confirm the contribution your project will make. Consider the questions below to help you identify the most important things to measure, set reasonable targets, and ensure the measures have the appropriate level of detail:

- What is the purpose of your project?
- What do you hope (and can you realistically expect) to achieve?
- What is the evidence base for your project? For example:

Who will achieve the change? The project performance measures need to state "who" is the target, or beneficiary, of the project's work. Who is the population, or sample (if appropriate), that is the subject of the measure? Measure language should include this level of specificity to demonstrate "who" is being measured for change or improvement. Examples typically found in education include students, parents, teachers, and school or district stakeholders. The answer to "who" will achieve the change is project-specific.

How much change is expected? The project performance measures need to clearly state how much change is expected. Ideally, the foundational knowledge that the project was designed around prior to winning the grant provides guidance as to how much change can be expected. Practically, how much change can you reasonably expect? Consult such sources of information as the research and literature that informed project development, as well as background information on any assessments, scales, or other instrumentation used. This information can help you determine how much change is realistic based on characteristics of your project (e.g., outcome of interest, age or grade level of the project's target population). See the sidebar on "State- and Study-Administered Tests: Considerations for Estimating Project Impacts" for information on using such tests to examine the impacts of educational interventions.

– You will need to determine whether or not you have baseline information, which may vary depending upon the performance measure and what instrumentation and/or information is available to inform the measure. For example, if the measure pertains to student achievement on a state assessment, prior year performance may serve as baseline. If baseline information is not available, consult with your PO to determine if Year 1 data may serve as baseline, and talk with your evaluator to identify different options for demonstrating change in performance.

Suggestion for Success!

Be sure to have the performance measures you included in your grant application on-hand as you begin Step 1, and keep them handy throughout the five-step approach.

You may want to include them as you work your way through the five-step process, ultimately deciding whether or not they should be included in your final portfolio of performance measures. After going through this process, you may find that some of the project measures included in your application are no longer a good fit, whereas others may be on target but need language refinement. Be sure to talk with your Project Officer if this happens, to ensure that the performance measures you ultimately choose align with his or her expectations for your project.

When will the change take place?

The project performance measures need to identify a time frame for when the change will occur. Here again, you may want to rely on the research literature underpinning project development, as well as background information on any assessments, scales, or other instrumentation used, to gauge how long the change process might take. Prior work by the grantee or others could also help determine how long it should take for the project to achieve an effect. Each project team will have to identify what is reasonable for its work. For example, projects are not required or expected to achieve all of the long-term outcomes in the logic model, such as those that reflect a change in systems (e.g., improved implementation of IDEA). Also note that some measures may relate to changes expected early in the project (e.g., teacher professional development) and others may look for change by project's end (e.g., changes in students' mathematics assessment scores).

Suggestion for Success!

Consider assigning responsibility for each type of document to a specific team member to share the responsibility for document review. Plan for a short review period, such as one to two weeks, with an expectation that team members will report back and share findings with the whole project team.

Suggested resource:
Demonstrating Evidence Across the Project Cycle

State- and Study-Administered Tests: Considerations for Estimating Project Impacts

"Estimating the Impacts of Educational Interventions Using State Tests or Study-Administered Tests," an Institute of Education Sciences (IES) report, describes differences in impact estimates and standard errors based on analyses of State achievement test data, data from an assessment chosen because of its relevance to the population targeted for an educational intervention, or both. Report authors assert that State tests cover proficiencies that may or may not align with the intervention implemented and may therefore yield results that are different from those based on an assessment administered specifically for the intervention. The evaluation team also has less control over other factors associated with State tests, such as when tests are administered (Olsen, Unlu, Jaciw, & Price, 2011).

Other IES reports that relate to effect size may be of interest, and can be found at: https://ies.ed.gov/funding/resources.asp.

Your team will need to determine a process that works well for documenting your review of the materials and information. As you think through how to answer these questions, you will need to identify relevant sources of data that can inform your project performance measures.

Consider meeting as a project team to:

- have each person report results of their documentation review; and
- work together to draft responses to the questions listed in the Step 1 Template in Appendix C. [REMINDER: Excel templates are available along with this *Guide* on the OSEP IDEAs That Work website.]

The information will be used in later steps to help identify project performance measures.

Table 2 shows the results of this step for our example, the fictional *ARISE Center*.

Table 2. *Sample Step 1 Template - Summarizing Key Points from the ARISE Center Document Review*

Question	Response	Source of Information
1. What is the purpose of your project?	1. Improve the quality of early elementary reading instruction delivered by general and special educators. 2. Increase reading achievement among elementary students receiving special education services.	Grant application
2. What are the top 3-4 results you hope to achieve?	1. Increased use of best practices in elementary reading instruction by general and special educators. 2. Increased educator capacity and skills related to elementary reading instruction. 3. Improved quality of elementary reading instruction delivered by general and special educators. 4. Increased elementary reading achievement among students with disabilities.	Project logic model
2a. How will you know you achieved project results?	1. Results of pre/post-structured classroom observations. 2. Results of pre/post-educator self report and assessment. 3. The percentage of fourth-grade students who make gains on the state reading assessment compared to their performance on the state reading assessment in third grade.	Evaluation plan
3. What is the evidence base for your project?	1. When general and special educators use evidence-based practices, they increase the likelihood of positive outcomes for students (Cook & Odom, 2013). 2. Reading levels at the end of third grade predict reading levels in high school and high school graduate rates (National Research Council, 1998). 3. The National Reading Panel describes skills important to become successful readers.	Research/literature
3a. Who is expected to change?	1. LEA administrators and general and special educators are expected to improve knowledge and change their practices. Each year a new cohort of educators will receive *ARISE Center* support. 2. Students are expected to increase achievement.	Project logic model, evaluation plan
3b. How much change is reasonable to expect?	1. 85% of educators who participate in TA demonstrate an increase on a knowledge assessment from pre- to post-test. 2. Overall, fourth grade students in participating educators' classrooms demonstrate a gain of 0.50 standard deviations on state-wide measures of reading achievement from pre- to post-test.	Evaluation plan
3c. Over what time period is the change expected to take place?	1. Changes in short- and medium-term outcomes will be monitored and reported annually. 2. Long-term outcomes that are expected to be met by the end of the project funding period will be tracked annually.	Evaluation plan

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STEP 2

Identify Activities, Outputs, and Outcomes

PURPOSE OF

STEP 2

Identify the key project activities, outputs, and outcomes.

The information gathered during Step 1 provides the key sources of information to confirm that project activities are grounded in strong theory and evidence.[11] For Step 2, you will identify the key project activities, outputs, and outcomes for your project. To complete Step 2, have the team lead, or an appointed facilitator, lead a discussion to identify the key project activities, outputs, and outcomes (be sure to include short-, medium- and long-term outcomes). We suggest using the logic model to guide this discussion, as all the information should be available there. As a reminder, logic models are considered visual representations of a theory of change (or action), and they outline how and why an initiative, policy, or program should work.[12] Appendix B presents OSEP's template for logic model development, with information about what kinds of information are typically included in logic models.

It is not uncommon to plan a project and then need to make adjustments after the work gets underway based on new information, or on circumstances that differ from the original plans. Or, once the project is up and running, you may reflect on your original thinking and find that new ideas, approaches, or contextual factors should be considered. If appropriate, take these factors into consideration as you proceed with this step. If you discover during your discussions that something is missing from the logic model — or if things have changed now that your project has started — be sure to add it, and update the project and evaluation plans if necessary.[13] For example, the *ARISE Center* team discussed the importance of tracking data on visitors to the TA website, to examine the extent to which administrators and educators seek available web-based resources. As a result, the team added "The number of unique visitors to the TA website each day" to its logic model, in the Outputs column (see Figure 2, the fifth component).

Suggestion for Success!

Consider identifying a team member to facilitate a brainstorming session, whereby all ideas are captured in a rapid-fire approach. Next, have the facilitator lead the team through reflection and discussion of all the items listed, winnowing the list to those that most people agree should be kept.

11. For more information on how to demonstrate evidence for your project, see *Demonstrating Evidence Across the Project Cycle*.
12. See Frechtling, J.A. (2007). Logic modeling methods in program evaluation. San Francisco: Jossey-Bass.
13. See *Evaluating Special Education Programs: Resource Toolkit* for more information.

Figure 2. *ARISE Center Logic Model*

INPUTS	STRATEGIES/ ACTIVITIES	OUTPUTS	OUTCOMES: SHORT-TERM	OUTCOMES: MEDIUM-TERM	OUTCOMES: LONG-TERM
Funding Research Center staff TA providers	Develop and disseminate **best-practice products** Provide online **professional development** Provide **Universal TA**: Website, social media, listserv Provide **Targeted TA**: Community of practice with special educators in participating LEAs Provide **Intensive TA**: In-person and one-on-one TA with selected special educators in participating LEAs	Number of products Number of online PD sessions Number of educators participating in PD sessions Number of website posts, social media posts, emails sent via listserv **The number of unique visitors to the TA website each day** Number of LEAs and educators participating in targeted TA Number of LEAs and educators participating in intensive TA	Increased awareness of Center resources, PD, and TA among general and special educators and LEA administrators Increased knowledge of best practices for students with disabilities in elementary reading instruction among general and special educators	Increased administrator support for the use of best practices in elementary reading instruction Increased use of best practices for students with disabilities in elementary reading instruction among general and special educators	Improved quality of elementary reading instruction delivered by general and special educators Increased elementary reading achievement among students with disabilities Improved long-term outcomes for students with disabilities

External Factors: Federal policy, state policy, LEA support for time for PD and TA, total hours of PD and TA received, educator skill and capacity, collaboration

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Table 3 shows an example of some of the results of Step 2 for the *ARISE Center*. The STEP 2 TEMPLATE is available in Appendix C if you would like to use it to list your project's activities, outputs, and outcomes. If, however, your team thinks the logic model is straightforward enough to serve as a source of this information for use in future steps, no further documentation is needed.

Table 3. *Results of Step 2 for the ARISE Center — Listing Key Project Activities, Outputs, and Outcomes*

Activities	Outputs	Short-term Outcomes	Medium-term Outcomes	Long-term Outcomes
A1. Develop and disseminate best practice products	O1. Number of products	ST1. Increased awareness of Center resources, PD, and TA among general and special educators and administrators	MT1. Increased use of best practices for students with disabilities in elementary reading instruction among general and special educators	LT1. Improved quality of elementary reading instruction delivered by general and special educators
A2. Provide online professional development	O2. Number of online PD sessions	ST2. Increased knowledge of best practices for students with disabilities in elementary reading instruction among general and special educators		LT2. Increased elementary reading achievement among students with disabilities
A3. Provide universal TA	O3. Number of website posts, social media posts, and emails sent via listserv			
	O4. Number of unique visitors to the TA website each day			

Note how in Table 3 the *ARISE Center* team listed various activities; outputs; and short-, medium-, and long-term outcomes. Doing this ensures that all team members have a shared understanding of project processes and expected outcomes. Be cautious about listing too much information in this step. Instead, try to focus on the most important items in each category and avoid listing every component or aspect of your project. Ultimately, your project performance measures should reflect the **most important** aspects of your project work and its expected outcomes. We strongly recommend talking with your PO to ensure that you are including elements that align with his or her expectations for your project.

Once you have identified activities, outputs, and outcomes, proceed to STEP 3.

STEP 3

Identify the Most Critical Indicators of Progress and Results

PURPOSE OF **STEP 3**

Identify the subset of items from your logic model that are most meaningful to use as project performance measures.

Once you have identified the list of key project activities; outputs; and short-, medium-, and long-term outcomes, in Step 3 you will focus on narrowing the list to include only the most critical indicators of progress and results. Specifically, you will identify the subset of logic model items, or critical indicators, that are most meaningful to use as project performance measures.

First, list all the items that you identified in Step 2, in the corresponding (or relevant) column (e.g., activities, outputs, outcomes) in the STEP 3 TEMPLATE A included in Appendix C. [Note: Appendix C includes additional templates for activities, outputs, short-term outcomes, medium-term outcomes, and long-term outcomes. These are also available as Excel files that accompany this Guide on the OSEP IDEAs That Work website.] Then, assign a score to each item in the STEP 3 TEMPLATE A. This act of rating, or ranking, the items will help you identify and prioritize the subset of items that are the most relevant and meaningful to your project. In the end, only the highest scoring indicators will be included as your team moves forward through the remaining steps. We suggest having each team member complete this activity independently, outside of a team meeting. Then, come back together and share and discuss ratings, ultimately reaching consensus on the ratings across all items.

Let's go back to our example. The *ARISE Center* team reviewed the list in Table 3 from Step 2 to determine if anything listed was already measured by the *GPRA* measures. In their case, the items in Table 3 and TA&D's *GPRA* measures examine different things. Therefore, all 12 of the *ARISE Center*'s items will be considered for inclusion as project measures. Table 4 presents the results of the Step 3 assessment of the *ARISE Center's* measures.

Suggestion for Success!

Consider having each team member complete this activity independently, outside of a team meeting. Next, consolidate the scores and review together.

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Table 4. *Sample Step 3 Template A — Assessing Key Project Activities, Outputs, and Outcomes**

Questions	A1	A2	A3	O1	O2	O3	O4	ST1	ST2	MT1	LT1	LT2
Related to your project's logic model?												
Does this relate to the top one or two purposes for the project? (x 2)	0	0	2	0	0	0	0	2	2	2	2	2
Does this relate to the top issues identified in the literature? (x 2)	0	0	0	0	0	0	0	2	2	2	2	2
Does it relate to a part of the theory of change that is essential for the project's success? (x 2)	2	2	2	0	2	2	0	2	2	2	2	2
Measurable?												
Is it measurable within the current limitations (e.g., resource constraints) of the project?	0	1	1	1	1	1	1	0	1	0	1	1
Does it rely on objective data sources?	1	1	1	0	1	1	1	0	1	0	0	1
Does it rely on existing data (i.e., something the project is already doing or collecting)?	0	0	1	0	1	0	0	0	0	0	0	1
Will data collection and analysis be uncomplicated (i.e., it will not be burdensome)?	0	1	0	1	1	0	0	1	1	1	1	1
Can you assign a value for how much change is expected?	1	1	1	0	1	1	1	0	1	0	0	1
Can you identify the time frame when the change will occur?	1	1	0	1	0	0	1	1	1	1	1	1
Is this item actionable? (i.e., can you make project improvements based on what you learn?)	1	0	0	1	0	0	1	1	0	1	1	1
Meaningful to stakeholders?												
Is this item understandable to a reasonable third party (e.g., outside stakeholder)?	1	1	1	1	1	1	1	1	1	1	1	1
Total per item (max score of 14)	**7**	**8**	**9**	**5**	**8**	**6**	**6**	**10**	**12**	**10**	**11**	**14**

*For each question, enter a "1" in the cell if the answer is "yes" and a "0" if the answer is "no" unless otherwise indicated. Some indicators are more critical to project success than others. Questions related to the critical indicators are weighted double the value (you will enter a "2" in these cells). The total maximum score across all items is 14.

Activities (A)
A1. Develop and disseminate best practice products
A2. Provide online professional development
A3. Provide universal TA
Outputs (O)
O1. Number of products
O2. Number of online PD sessions
O3. Number of website posts
O4. Number of unique visitors to the TA website each day
Short-term Outcomes (ST)
ST1. Increased awareness of Center resources, PD, and TA among general and special educators and LEA administrators
ST2. Increased knowledge of best practices for students with disabilities in elementary reading instruction among general and special educators

Medium-term Outcomes (MT)
MT1. Increased use of best practices for students with disabilities in elementary reading instruction among general and special educators
Long-term Outcomes (LT)
LT1. Improved quality of elementary reading instruction delivered by general and special educators
LT2. Increased elementary reading achievement among students with disabilities

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After tallying the scores for each activity; output; and short-term, medium-term, and long-term outcomes, analyze the results by looking across all the scores. Prioritize the highest scoring items for continued consideration; if possible, limit the items you consider for selection to only those items with a perfect score. If this is not possible, work with your team to determine the best method for identifying the set of items to advance to the next step. For example, if you are not limiting to the set of items with a perfect score, then can you limit to those with a score greater than or equal to 7, or half the maximum total score? Be sure to include your PO and evaluator in these discussions!

Once you have identified the items that are highest scoring and that you will advance for consideration as performance measures, list them in the STEP 3 TEMPLATE B (see Appendix C).

Returning to the *ARISE Center* example, in Table 4, nine items received a score of 7 or more [Note: This threshold is used for illustrative purposes; you can determine the most suitable threshold for your project]. These items are listed in Table 5 and will move forward to be considered for inclusion as project measures in Step 4.

Table 5. *Sample Step 3 Template B — Identifying Key Items to Use as Potential Project Measures*

Type (e.g., Activity, Output, Short-, Medium-, or Long-term Outcome)	Item
Activity	Develop and disseminate best practice products
Activity	Provide online professional development
Activity	Provide universal TA
Output	Number of online PD sessions
Short-term outcome	Increased awareness of Center resources, PD, and TA among special educators
Short-term outcome	Increased knowledge of best practices for students with disabilities in elementary reading instruction among general and special educators
Medium-term outcome	Increased use of best practices for students with disabilities in elementary reading instruction among general and special educators
Long-term outcome	Improved quality of elementary reading instruction delivered by general and special educators
Long-term outcome	Increased elementary reading achievement among students with disabilities

STEP 4

Select Logic Model Items

PURPOSE OF
STEP 4

Select a final set of items that form the basis of the project performance measures for reporting to OSEP each year.

In Step 4 you will select a final set of items that will form the basis of the project performance measures for reporting to OSEP each year. Start by reviewing the list of items you included in the STEP 3 TEMPLATE B, then make a final selection of items to move forward as performance measures. Team members may want to independently identify preferences for items that they believe should make the final list.

Next, the team should meet and discuss whether all items, or a subset of items, should be selected, with members sharing their individual opinions and recommendations. If your evaluator is not on the team, make sure you seek his or her input on the final selection of measures, as the measures should be an accurate reflection of the most important aspects of the project that are being evaluated. In addition, be sure to talk with your PO to ensure that the items you are selecting will align with his or her expectations for your project!

As you think about which items to use as performance measures, consider:

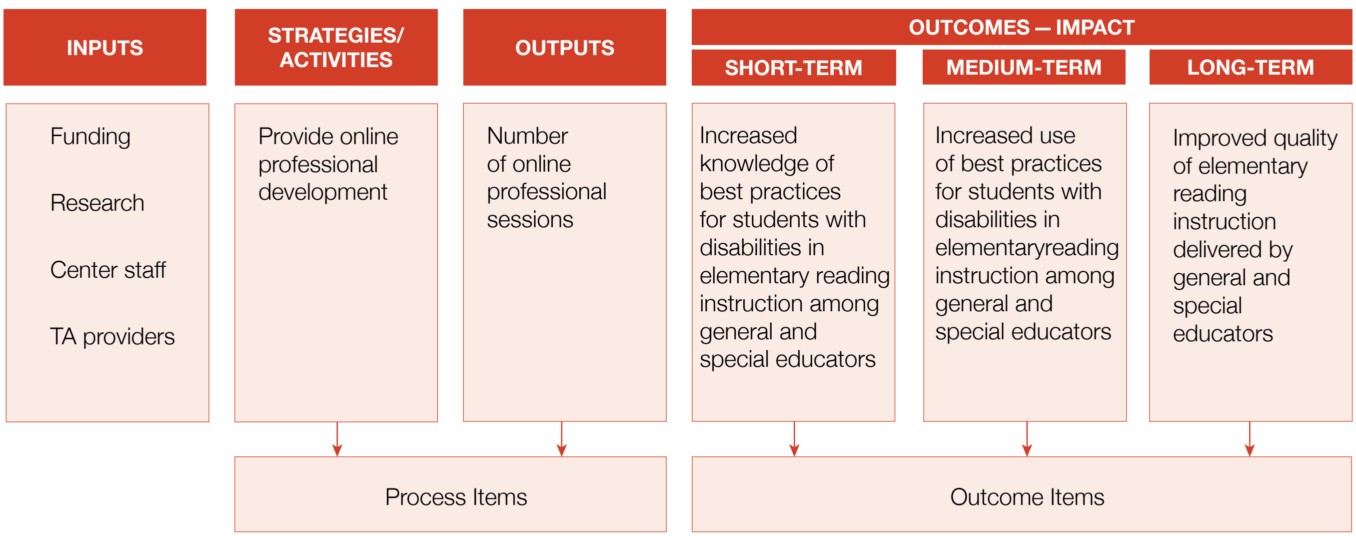
- How many items are listed in the STEP 3 TEMPLATE B?
  - If there are only a few (less than 6-8), then you may want to include all of them.
  - If there are more than a few, consider selecting the items that will likely yield the most information, with an emphasis on those that relate to short-, medium-, and long-term outcomes.
- What are the key project milestones or accomplishments that indicate progress toward achieving outcomes?
- What are the costs and feasibility of measuring the items listed?
  - Opt for the least costly and most feasible items, while still maintaining the focus on demonstrating evidence of progress and results.
  - Avoid the temptation of choosing primarily the easiest items to measure!!

Keep in mind that too many measures can be overwhelming and reflect a lack of focus on what is most important. Avoid this “over-measurement” situation, which can be burdensome and offer little added value.

What is the difference between process and outcome measures?

Your logic model is a good source of information for differentiating process and outcome items, and ultimately the measures they represent. **Process** items reflect those things listed in the activities and outputs columns, and **outcome** items are those things listed in the short-, medium-, and long-term outcomes columns (**Figure 3**). OSEP is most interested in grantee reports on outcomes but recognizes that sometimes, such as early in the grant, process measures are important indicators of progress. More information on process and outcome measures can be found in the Part B video on the OSEP Ideas that Work website (https://osepideasthatwork.org/logicModel).

Figure 3. *Process vs. Outcome Measures in the Logic Model*



Ultimately, the team will need to work together to reach agreement on the final list of items to advance for measure development. Here, there is no substitute for the team's deep content knowledge and context-specific details about the project itself, as well as an evaluator's expertise. Record final decisions in the STEP 4 TEMPLATE, which can be found in Appendix C.

Returning to the *ARISE Center* example, Table 6 shows that the team agreed upon only four items during their final reflection in Step 4. The team decided to focus exclusively on four outcome measures, and therefore four items moved forward in Step 4.

Suggestion for Success!

If the choice of measures is not obvious or simple, then the team should work together, and with your evaluator and PO, to reach agreement to ensure support for the final decisions.

Table 6. *Sample Step 4 Template — Creating a Final List of Items for Use as Performance Measures*

Type	Item Text
Short-term outcome	Increased knowledge of best practices for students with disabilities in elementary reading instruction among general and special educators.
Medium-term outcome	Increased use of practices for students with disabilities in elementary reading instruction among general and special educators.
Long-term outcome	Improved quality of elementary reading instruction delivered by general and special educators.
Long-term outcome	Increased elementary reading achievement among students with disabilities.

As you work through this and all steps in this process, keep in mind that every project is different and your team will need to do what works for your project. Always remember to work with your evaluator and your PO to ensure that your final list of performance measures is realistic, feasible, and meets OSEP's expectations for your project! Additionally, remember to update your project and evaluation plans to reflect any changes you have made based on team reflections and discussions.

It is important to note here that even though your team may not select certain items from the logic model to advance for use as project measures, you should still consider collecting data and monitoring progress on all logic model items as part of your overall project evaluation. You will not report on all of your project monitoring activities in your annual report to OSEP. Instead, you will report on only those measures on your final list that are related to the most critical items. Please work with your PO if you have questions about which items to report.

The final step is to refine the measure language to ensure that it meets OSEP's requirements.

STEP 5

Finalize Performance Measure Language

PURPOSE OF
STEP 5

Create and finalize the language for the project performance measures.

At this point you should have a list of items that reflect the most important parts of the project to measure (i.e., the contents of the STEP 4 TEMPLATE). These will become your project performance measures. Essentially, the items represent key activities, outputs, and outcomes related to the project that you will report to OSEP as part of your required performance reporting. OSEP has specific requirements for how a project performance measure should be worded. This section explains how to meet those requirements.

The purpose of Step 5 is to create and finalize the language for your project performance measures. The final list of items you identified in Step 4 likely represents measure concepts that may be general in nature. This section will help you create and finalize the language for your project performance measures in order to meet OSEP's requirements.

Recall that in Step 1, you answered a series of questions to help you identify the most important things to measure and to set reasonable targets. Now you will revisit those questions and create measures that specify:

- "What" is being measured?
- "Who" will achieve the change?
- "How much" change is expected?
- "When" will the change take place?

This first part of transforming item text into performance measures is making sure that you refer to "what" is being measured. You may have a simple list from your logic model of items such as "teacher professional development" or "student achievement." Although these items may be short, accurate descriptions within the context of a specific project and its logic model, OSEP and other stakeholders who may review measures in the abstract benefit from having additional details related to *what* is being referenced.

Suggestion for Success!

Ensure that your measures have the level of specificity needed to outline important details about changes that are expected to occur as a result of project implementation. Use action-oriented terms such as increase, decrease, or improve.

To do this, copy the Item Text that you developed in Table 6 in Step 4 into the "Initial Item Text" column in the STEP 5 TEMPLATE. Then, work through each subsequent column in the STEP 5 TEMPLATE to add the additional level of specificity until you reach the last column. You may consider having members work independently to add this first layer of specificity.

The final part of this step is to combine the information listed in each column for each measure and write a refined, clearly specified measure that meets all of OESP's requirements. The result will be the Final Project Performance Measure Text listed in the final column of the STEP 5 TEMPLATE.

Table 7 demonstrates how to add the additional specificity to each measure for the *ARISE Center* example.

Table 7. *Sample Step 5 Template — Drafting Final Performance Measure Language*

Type	Initial Item Text	What?	Who?	How Much?	When?	Final Project Performance Measure Text
Short-term outcome	Increased knowledge of best practices for students with disabilities in elementary reading instruction among general and special educators	Knowledge of best practices	General and special educators in participating LEAs	25-point increase	At the beginning of each school year and at the end of school year	Percentage of general and special educators in participating LEAs who complete the annual Reading Instruction Best Practices Workshop and increase their knowledge related to best practices for students with disabilities in elementary reading instruction by 25 points as measured on a knowledge assessment at the beginning and end of each school year, between grant years 1 and 5
Medium-term outcome	Increased use of best practices for students with disabilities in elementary reading instruction among general and special educators	Classroom use of best practices	General and special educators in participating LEAs	30-point increase	At the beginning of each school year and at the end of the school year	Percentage of general and special educators in participating LEAs who achieve a 30-point increase in use of best practices for students with disabilities in the classroom as measured by self-report on a survey at the beginning and end of each school year, between grant years 1 and 5
Long-term outcome	Improved quality of elementary reading instruction delivered by general and special educators	Quality of reading instruction	General and special educators in participating LEAs	Statistically significant gain	From the beginning to the end of each school year	Percentage of general and special educators in participating LEAs who achieve a statistically significant gain in scores on the Quality Reading Instruction Classroom Observation Tool from the beginning to the end of the school year, between grant years 1 and 5
Long-term outcome	Increased elementary reading achievement among students with disabilities	Improved reading achievement	Students with disabilities	0.50 standard deviations	From the end of 3rd grade to the end of 4th grade	Percentage of students with disabilities who achieve gains equal to or greater than 0.50 standard deviations on the state-wide reading assessment between the end of 3rd grade and the end of 4th grade, between years 1 and 5

Summary

Congratulations on completing your project performance measure development or refinement work! Your project measures are critically important for tracking, monitoring, and improving performance on the pathway to project success. Using a comprehensive performance measurement framework can help your project team assess its progress toward achieving project goals. Reporting on both *GPRA* and project measures will help you to discern what is working and what may need strengthening throughout the project life cycle, particularly during critical periods when course corrections can make a difference for outcomes.

Work with your evaluator to collect, analyze, and report all the relevant information that informs your work. Additionally, we recommend sharing your project performance measures with your PO throughout the project funding period, particularly at critical junctures (e.g., prior to performance reporting cycles). Be sure to give him or her an opportunity to provide feedback and approval.

For additional tools and resources that support project implementation, visit the IDEAs That Work website.

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Appendix A
OSEP *GPRA* Measures, by Program

Table A-1. *Educational Technology, Media, and Materials (ETechM2) GPRA Measures*

Program	Measure Number	Measure
ETechM2 Objective 1	1.1 of 6	The percentage of Educational Technology, Media, and Materials Program products and services judged to be of high quality by an independent review panel of experts qualified to review the substantive content of the products and services
	1.2 of 6	The percentage of Educational Technology, Media, and Materials Program products and services judged by an independent review panel of qualified experts to be useful in improving results for infants, toddlers, children and youth with disabilities
	1.3 of 6	The federal cost per unit of accessible educational materials funded by the Educational Technology, Media, and Materials Program
	1.4 of 6	The percentage of Educational Technology, Media, and Materials Program products and services judged by an independent review panel of qualified experts to be of high relevance to improving outcomes of infants, toddlers, children and youth with disabilities
	1.5 of 6	The federal cost per unit of video description funded by the Educational Technology, Media, and Materials Program.
	1.6 of 6	The federal cost per unit of Accessible Educational Materials from the NIMAC funded by the Educational Technology, Media, and Materials Program

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Table A-2. *Parent Information Centers GPRA Measures*

Program	Measure Number	Measure
Parent Information Centers *Objective 1*	1.1 of 4	The percentage of materials disseminated by Parent Training and Information Centers Program projects deemed to be of high quality by an independent review panel of experts qualified to review the substantive content of the products or services
	1.2 of 4	The percentage of Parent Training and Information Centers Program products and services deemed to be of high relevance to educational and early intervention policy or practice by an independent review panel of qualified experts with appropriate expertise to review the substantive content of the products or services
	1.3 of 4	The percentage of all Parent Training and Information Centers Program products and services deemed by an independent review panel of qualified experts to be useful to improve educational or early intervention policy or practice
	1.4 of 4	An index of the federal cost per unit of output provided by the Parent Training and Information Centers Program
Parent Information Centers *Objective 2*	2.1 of 1	The percentage of parents receiving Special Education Parent Information Centers services who report enhanced knowledge of IDEA rights and responsibilities
Parent Information Centers *Objective 3*	3.1 of 1	The percentage of parents receiving Special Education Parent Information Centers services who report having enhanced capacity to work with schools and service providers effectively in meeting the needs of their children

Table A-3. *State Personnel Development Grant (SPDG) GPRA Measures*

Program	Measure Number	Measure
SPDG *Objective 1*	1.1 of 1	Percentage of SPDG-funded initiatives that meet benchmarks for use of evidence-based professional development practices to support the attainment of identified competencies
SPDG *Objective 2*	2.1 of 2	The percentage of Special Education State Personnel Grant-funded Initiatives that meet benchmarks for improvement in implementation of SPDG-supported practices over time
	2.2 of 2	The percentage of Special Education State Personnel Grant-funded initiatives that meet targets for the use of funds to sustain SPDG-supported practices
SPDG *Objective 3*	3.1 of 1	Percent of State Personnel Development Grant-funded projects that meet targets for retention of special education teachers

Table A-4. *Technical Assistance & Dissemination (TA&D) GPRA Measures*

Program	Measure Number	Measure
TA&D *Objective 1*	1.1 of 1	The percentage of States receiving Special Education Technical Assistance and Dissemination services regarding scientifically- or evidence-based practices for infants, toddlers, children and youth with disabilities that successfully promote the implementation of those practices in school districts and service agencies
TA&D *Objective 2*	2.1 of 5	The percentage of Technical Assistance and Dissemination products and services deemed to be of high quality by an independent review panel of experts qualified to review the substantive content of the products and services
	2.2 of 5	The percentage of Special Education Technical Assistance and Dissemination products and services deemed by an independent review panel of qualified experts to be of high relevance to educational and early intervention policy or practice
	2.3 of 5	The percentage of all Special Education Technical Assistance and Dissemination products and services deemed by an independent review panel of qualified experts to be useful to improve educational or early intervention policy or practice
	2.5 of 5	The cost efficiency of the Special Education Technical Assistance and Dissemination Program as measured by milestones achieved and funds drawn down in a reporting year
TA&D *Objective 3*	3.1 of 1	The percentage of effective evidence-based program models developed by Model Demonstration Projects that are promoted to states and their partners through the TA&D Network

Table A-5. *Personnel Development Program (PDP) GPRA Measures*

Program	Measure Number	Measure
PDP *Objective 1*	1.1 of 2	The percentage of Special Education Personnel Development projects that incorporate evidence-based practices into their curricula
	1.2 of 2	The percentage of scholars completing programs who are knowledgeable and skilled in evidence-based practices for children with disabilities
PDP *Objective 2*	2.1 of 4	The percentage of scholars who exit preparation programs prior to completion due to poor academic performance
	2.2 of 4	The percentage of scholars completing preparation programs who are working in the area(s) in which they were prepared upon program completion
PDP *Objective 3*	3.1 of 1	The Federal cost per scholar who completed the preparation program

Appendix B
OSEP Logic Model Template

Figure B-1. *OSEP Logic Model Template*

INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES: SHORT-TERM	OUTCOMES: MEDIUM-TERM	OUTCOMES: LONG-TERM
What we invest Staff Volunteers Time Money Research base Materials Equipment Technology Partners	**What we do** Develop/ implement programs Develop/ implement direct services Develop products, technology, curriculum, resources Train Research Assess Facilitate Partner/ collaborate Disseminate	**What we produce** Number of Activities conducted Quality of activities conducted Fidelity of activities conducted Number of targeted clients reached Number of participants Characteristics of participants	**What the short-term results are** **Learning:** Awareness Knowledge Attitudes Skills Opinions Aspirations Motivations	**What the medium-term results are** **Action:** Behavior Practice Decision making Policies Social action Organization change	**What the ultimate impact is** **Conditions:** Social Economic Civic Environmental

External Factors

Evaluation: Focus | Collect Data | Analyze | Interpret | Report

Adapted from: University of Wisconsin-Extension. (2010). Program Action-Logic Model.

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Appendix C
Templates

Step 1 Template: Summary of Key Points from Document Review

Instructions: For each question, enter the response and source of information in the corresponding column.

Question	Response	Source of Information
1. What is the purpose of your project (e.g., improve the quality of instruction)?		
2. What are the top 3-4 results you hope to achieve (e.g., increased use of best practices)?		
2a. How will you know you achieved project results (e.g., results of pre/post-structured classroom observations)?		
3. What is the evidence base for your project (e.g., summary of major findings from relevant research articles)?		
3a. Who is expected to change (e.g., general and special educators)?		
3b. How much change is reasonable to expect (e.g., 85% of educators who participate in TA)?		
3c. Over what time period is the change expected to take place (e.g., each year, by Year 3)?		

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Step 2 Template: Key Project Activities, Outputs, and Outcomes

Instructions: List each key logic model component in the appropriate row:

Item Key	Activities
A1	
A2	
A3	
A4	
A5	
A5	
A7	
A8	
A9	
A10	
A11	
A12	
A13	
A14	
A15	
A16	
A17	
A18	
A19	
A20	

Step 2 Template: Key Project Activities, Outputs, and Outcomes (cont.)

Instructions: List each key logic model component in the appropriate row:

Item Key	Outputs
O1	
O2	
O3	
O4	
O5	
O5	
O7	
O8	
O9	
O10	
O11	
O12	
O13	
O14	
O15	
O16	
O17	
O18	
O19	
O20	

Step 2 Template: Key Project Activities, Outputs, and Outcomes (cont.)

Instructions: List each key logic model component in the appropriate row:

Item Key	Short-term Outcomes
ST1	
ST2	
ST3	
ST4	
ST5	
ST6	
ST7	
ST8	
ST9	
ST10	
ST11	
ST12	
ST13	
ST14	
ST15	
ST16	
ST17	
ST18	
ST19	
ST20	

Step 2 Template: Key Project Activities, Outputs, and Outcomes (cont.)

Instructions: List each key logic model component in the appropriate row:

Item Key	Medium-term Outcomes
MT1	
MT2	
MT3	
MT4	
MT5	
MT6	
MT7	
MT8	
MT9	
MT10	
MT11	
MT12	
MT13	
MT14	
MT15	
MT16	
MT17	
MT18	
MT19	
MT20	

Step 2 Template: Key Project Activities, Outputs, and Outcomes (cont.)

Instructions: List each key logic model component in the appropriate row:

Item Key	Long-term Outcomes
LT1	
LT2	
LT3	
LT4	
LT5	
LT6	
LT7	
LT8	
LT9	
LT10	
LT11	
LT12	
LT13	
LT14	
LT15	
LT16	
LT17	
LT18	
LT19	
LT20	

Step 3 Template A: Assessment of Key Project Activities

Instructions: For each question in Part 1, enter a "1" in the corresponding column (e.g., A1, A2, A3) if the answer is "yes" and a "0" if the answer is "no," unless otherwise specified. Some indicators are more critical to project success than others. Questions related to the critical indicators are weighted double the value (you will enter a "2 " in these cells). The total maximum score across all items is 14. **Please note that there are formulas in the "Total per item" row to sum item scores. For reference, the activities you listed in Step 2 will appear in Part 2 on this sheet.**

PART 1																				
Related to your project's logic model?	**A1**	**A2**	**A3**	**A4**	**A5**	**A6**	**A7**	**A8**	**A9**	**A10**	**A11**	**A12**	**A13**	**A14**	**A15**	**A16**	**A17**	**A18**	**A19**	**A20**
Does this relate to the top one or two purposes for the project? (Enter "2" if the answer is "yes.")																				
Does this relate to the top issues identified in the literature? (Enter "2" if the answer is "yes.")																				
Does it relate to a part of the theory of change that is essential for the project's success? (Enter "2" if the answer is "yes.")																				
Measurable?	**A1**	**A2**	**A3**	**A4**	**A5**	**A6**	**A7**	**A8**	**A9**	**A10**	**A11**	**A12**	**A13**	**A14**	**A15**	**A16**	**A17**	**A18**	**A19**	**A20**
Is it measurable within the current limitations (e.g., resource constraints) of the project?																				
Does it rely on objective data sources?																				
Does it rely on existing data (i.e., something the project is already doing or collecting)?																				
Will data collection and analysis be uncomplicated (i.e., it will not be burdensome)?																				
Can you assign a value for how much change is expected?																				
Can you identify the time frame when the change will occur?																				
Is this item actionable? (i.e., can you make project improvements based on what you learn?)																				
Meaningful to stakeholders?	**A1**	**A2**	**A3**	**A4**	**A5**	**A6**	**A7**	**A8**	**A9**	**A10**	**A11**	**A12**	**A13**	**A14**	**A15**	**A16**	**A17**	**A18**	**A19**	**A20**
Is this item understandable to a reasonable third party (e.g., outside stakeholder)?																				
Total per item (max score of 14)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Step 3 Template A: Assessment of Key Project Activities (cont.)

PART 2																					
A1	0																				
A2	0																				
A3	0																				
A4	0																				
A5	0																				
A6	0																				
A7	0																				
A8	0																				
A9	0																				
A10	0																				
A11	0																				
A12	0																				
A13	0																				
A14	0																				
A15	0																				
A16	0																				
A17	0																				
A18	0																				
A19	0																				
A20	0																				

Step 3 Template A: Assessment of Key Project Outputs

Instructions: For each question in Part 1, enter a "1" in the corresponding column (e.g., A1, A2, A3) if the answer is "yes" and a "0" if the answer is "no," unless otherwise specified. Some indicators are more critical to project success than others. Questions related to the critical indicators are weighted double the value (you will enter a "2 " in these cells). The total maximum score across all items is 14. **Please note that there are formulas in the "Total per item" row to sum item scores. For reference, the outputs you listed in Step 2 will appear in Part 2 on this sheet.**

PART 1																				
Related to your project's logic model?	**O1**	**O2**	**O3**	**O4**	**O5**	**O6**	**O7**	**O8**	**O9**	**O10**	**O11**	**O12**	**O13**	**O14**	**O15**	**O16**	**O17**	**O18**	**O19**	**O20**
Does this relate to the top one or two purposes for the project? (Enter "2" if the answer is "yes.")																				
Does this relate to the top issues identified in the literature? (Enter "2" if the answer is "yes.")																				
Does it relate to a part of the theory of change that is essential for the project's success? (Enter "2" if the answer is "yes.")																				
Measurable?	**O1**	**O2**	**O3**	**O4**	**O5**	**O6**	**O7**	**O8**	**O9**	**O10**	**O11**	**O12**	**O13**	**O14**	**O15**	**O16**	**O17**	**O18**	**O19**	**O20**
Is it measurable within the current limitations (e.g., resource constraints) of the project?																				
Does it rely on objective data sources?																				
Does it rely on existing data (i.e., something the project is already doing or collecting)?																				
Will data collection and analysis be uncomplicated (i.e., it will not be burdensome)?																				
Can you assign a value for how much change is expected?																				
Can you identify the time frame when the change will occur?																				
Is this item actionable? (i.e., can you make project improvements based on what you learn?)																				
Meaningful to stakeholders?	**O1**	**O2**	**O3**	**O4**	**O5**	**O6**	**O7**	**O8**	**O9**	**O10**	**O11**	**O12**	**O13**	**O14**	**O15**	**O16**	**O17**	**O18**	**O19**	**O20**
Is this item understandable to a reasonable third party (e.g., outside stakeholder)?																				
Total per item (max score of 14)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Step 3 Template A: Assessment of Key Project Outputs (cont.)

PART 2																					
O1	0																				
O2	0																				
O3	0																				
O4	0																				
O5	0																				
O6	0																				
O7	0																				
O8	0																				
O9	0																				
O10	0																				
O11	0																				
O12	0																				
O13	0																				
O14	0																				
O15	0																				
O16	0																				
O17	0																				
O18	0																				
O19	0																				
O20	0																				

Step 3 Template A: Assessment of Key Project Outcomes (Short-term)

Instructions: For each question in Part 1, enter a “1” in the corresponding column (e.g., A1, A2, A3) if the answer is “yes” and a “0” if the answer is “no,” unless otherwise specified. Some indicators are more critical to project success than others. Questions related to the critical indicators are weighted double the value (you will enter a “2 ” in these cells). The total maximum score across all items is 14 . **Please note that there are formulas in the “Total per item” row to sum item scores. For reference, the short-term outcomes you listed in Step 2 will appear in Part 2 on this sheet.**

PART 1																				
Related to your project’s logic model?	**S1**	**S2**	**S3**	**S4**	**S5**	**S6**	**S7**	**S8**	**S9**	**S10**	**S11**	**S12**	**S13**	**S14**	**S15**	**S16**	**S17**	**S18**	**S19**	**S20**
Does this relate to the top one or two purposes for the project? (Enter “2” if the answer is “yes.”)																				
Does this relate to the top issues identified in the literature? (Enter “2” if the answer is “yes.”)																				
Does it relate to a part of the theory of change that is essential for the project’s success? (Enter “2” if the answer is “yes.”)																				
Measurable?	**S1**	**S2**	**S3**	**S4**	**S5**	**S6**	**S7**	**S8**	**S9**	**S10**	**S11**	**S12**	**S13**	**S14**	**S15**	**S16**	**S17**	**S18**	**S19**	**S20**
Is it measurable within the current limitations (e.g., resource constraints) of the project?																				
Does it rely on objective data sources?																				
Does it rely on existing data (i.e., something the project is already doing or collecting)?																				
Will data collection and analysis be uncomplicated (i.e., it will not be burdensome)?																				
Can you assign a value for how much change is expected?																				
Can you identify the time frame when the change will occur?																				
Is this item actionable? (i.e., can you make project improvements based on what you learn?)																				
Meaningful to stakeholders?	**S1**	**S2**	**S3**	**S4**	**S5**	**S6**	**S7**	**S8**	**S9**	**S10**	**S11**	**S12**	**S13**	**S14**	**S15**	**S16**	**S17**	**S18**	**S19**	**S20**
Is this item understandable to a reasonable third party (e.g., outside stakeholder)?																				
Total per item (max score of 14)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Step 3 Template A: Assessment of Key Project Outcomes (Short-term) (cont.)

PART 2																					
S1	0																				
S2	0																				
S3	0																				
S4	0																				
S5	0																				
S6	0																				
S7	0																				
S8	0																				
S9	0																				
S10	0																				
S11	0																				
S12	0																				
S13	0																				
S14	0																				
S15	0																				
S16	0																				
S17	0																				
S18	0																				
S19	0																				
S20	0																				

Step 3 Template A: Assessment of Key Project Outcomes (Medium-term)

Instructions: For each question in Part 1, enter a "1" in the corresponding column (e.g., A1, A2, A3) if the answer is "yes" and a "0" if the answer is "no," unless otherwise specified. Some indicators are more critical to project success than others. Questions related to the critical indicators are weighted double the value (you will enter a "2 " in these cells). The total maximum score across all items is 14. **Please note that there are formulas in the "Total per item" row to sum item scores. For reference, the short-term outcomes you listed in Step 2 will appear in Part 2 on this sheet.**

PART 1																				
Related to your project's logic model?	**M1**	**M2**	**M3**	**M4**	**M5**	**M6**	**M7**	**M8**	**M9**	**M10**	**M11**	**M12**	**M13**	**M14**	**M15**	**M16**	**M17**	**M18**	**M19**	**M20**
Does this relate to the top one or two purposes for the project? (Enter "2" if the answer is "yes.")																				
Does this relate to the top issues identified in the literature? (Enter "2" if the answer is "yes.")																				
Does it relate to a part of the theory of change that is essential for the project's success? (Enter "2" if the answer is "yes.")																				
Measurable?	**M1**	**M2**	**M3**	**M4**	**M5**	**M6**	**M7**	**M8**	**M9**	**M10**	**M11**	**M12**	**M13**	**M14**	**M15**	**M16**	**M17**	**M18**	**M19**	**M20**
Is it measurable within the current limitations (e.g., resource constraints) of the project?																				
Does it rely on objective data sources?																				
Does it rely on existing data (i.e., something the project is already doing or collecting)?																				
Will data collection and analysis be uncomplicated (i.e., it will not be burdensome)?																				
Can you assign a value for how much change is expected?																				
Can you identify the time frame when the change will occur?																				
Is this item actionable? (i.e., can you make project improvements based on what you learn?)																				
Meaningful to stakeholders?	**M1**	**M2**	**M3**	**M4**	**M5**	**M6**	**M7**	**M8**	**M9**	**M10**	**M11**	**M12**	**M13**	**M14**	**M15**	**M16**	**M17**	**M18**	**M19**	**M20**
Is this item understandable to a reasonable third party (e.g., outside stakeholder)?																				
Total per item (max score of 14)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Step 3 Template A: Assessment of Key Project Outcomes (Medium-term) (cont.)

PART 2																					
M1	0																				
M2	0																				
M3	0																				
M4	0																				
M5	0																				
M6	0																				
M7	0																				
M8	0																				
M9	0																				
M10	0																				
M11	0																				
M12	0																				
M13	0																				
M14	0																				
M15	0																				
M16	0																				
M17	0																				
M18	0																				
M19	0																				
M20	0																				

Step 3 Template A: Assessment of Key Project Outcomes (Long-term)

Instructions: For each question in Part 1, enter a “1” in the corresponding column (e.g., A1, A2, A3) if the answer is “yes” and a “0” if the answer is “no,” unless otherwise specified. Some indicators are more critical to project success than others. Questions related to the critical indicators are weighted double the value (you will enter a “2 ” in these cells). The total maximum score across all items is 14. **Please note that there are formulas in the “Total per item” row to sum item scores. For reference, the short-term outcomes you listed in Step 2 will appear in Part 2 on this sheet.**

PART 1																				
Related to your project’s logic model?	**L1**	**L2**	**L3**	**L4**	**L5**	**L6**	**L7**	**L8**	**L9**	**L10**	**L11**	**L12**	**L13**	**L14**	**L15**	**L16**	**L17**	**L18**	**L19**	**L20**
Does this relate to the top one or two purposes for the project? (Enter “2” if the answer is “yes.”)																				
Does this relate to the top issues identified in the literature? (Enter “2” if the answer is “yes.”)																				
Does it relate to a part of the theory of change that is essential for the project’s success? (Enter “2” if the answer is “yes.”)																				
Measurable?	**L1**	**L2**	**L3**	**L4**	**L5**	**L6**	**L7**	**L8**	**L9**	**L10**	**L11**	**L12**	**L13**	**L14**	**L15**	**L16**	**L17**	**L18**	**L19**	**L20**
Is it measurable within the current limitations (e.g., resource constraints) of the project?																				
Does it rely on objective data sources?																				
Does it rely on existing data (i.e., something the project is already doing or collecting)?																				
Will data collection and analysis be uncomplicated (i.e., it will not be burdensome)?																				
Can you assign a value for how much change is expected?																				
Can you identify the time frame when the change will occur?																				
Is this item actionable? (i.e., can you make project improvements based on what you learn?)																				
Meaningful to stakeholders?	**L1**	**L2**	**L3**	**L4**	**L5**	**L6**	**L7**	**L8**	**L9**	**L10**	**L11**	**L12**	**L13**	**L14**	**L15**	**L16**	**L17**	**L18**	**L19**	**L20**
Is this item understandable to a reasonable third party (e.g., outside stakeholder)?																				
Total per item (max score of 14)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Step 3 Template A: Assessment of Key Project Outcomes (Long-term) (cont.)

PART 2																					
L1	0																				
L2	0																				
L3	0																				
L4	0																				
L5	0																				
L6	0																				
L7	0																				
L8	0																				
L9	0																				
L10	0																				
L11	0																				
L12	0																				
L13	0																				
L14	0																				
L15	0																				
L16	0																				
L17	0																				
L18	0																				
L19	0																				
L20	0																				

Step 3 Template A: Summary of Scores Across All Key Items

Note: The cells below contain formulas to show total scores for all Activities, Outputs, and Outcomes (Short, Medium, and Long) you assessed in the previous sheets, for ease of comparison. Use the total scores to select the highest scoring items to advance to the remaining steps. **This sheet will help you compare sum scores; you will not enter information in this sheet.**

Activities	A1	A2	A3	A4	A5	A6	A7	A8	A9	A10	A11	A12	A13	A14	A15	A16	A17	A18	A19	A20
Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Outputs	O1	O2	O3	O4	O5	O6	O7	O8	O9	O10	O11	O12	O13	O14	O15	O16	O17	O18	O19	O20
Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Short-term Outcomes	ST1	ST2	ST3	ST4	ST5	ST6	ST7	ST8	ST9	ST10	ST11	ST12	ST13	ST14	ST15	ST16	ST17	ST18	ST19	ST20
Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Medium-term Outcomes	MT1	MT2	MT3	MT4	MT5	MT6	MT7	MT8	MT9	MT10	MT11	MT12	MT13	MT14	MT15	MT16	MT17	MT18	MT19	MT20
Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Long-term Outcomes	LT1	LT2	LT3	LT4	LT5	LT6	LT7	LT8	LT9	LT10	LT11	LT12	LT13	LT14	LT15	LT16	LT17	LT18	LT19	LT20
Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Step 3 Template B: Key Items to Use as Potential Project Measures

Instructions: List each of the highest-scoring items identified in Step 3 Template A that will advance for consideration as performance measures.

Type (i.e., Activity, Output, Short-, Medium-, or Long-term Outcome)	Item

Step 4 Template: Final List of Items for Use as Performance Measures

Instructions: After working with your team to reach agreement on the final list of items to advance for measure development, record final decisions in the Type and Item Text columns.

Type (i.e., Activity, Output, Short-, Medium-, or Long-term Outcome)	Item Text

Step 5 Template: Final Performance Measure Language

Instructions: Formulas have been entered in column A, so that Item Text you entered in the Step 4 Template has been copied from that template to column A of the Step 5 template. Enter the additional level of specificity for each column in each row.

Initial Item Text	Type (i.e., Activity, Output, Short-, Medium-, or Long-term Outcome)	What?	Who?	How Much?	When?	Final Performance Measure Text
0						
0						
0						
0						
0						
0						
0						
0						
0						
0						

Appendix D
Example: Fictional State Parent Training and Information Center

Project Description

Significance: In *Fictional State*, 14% of students are identified with disabilities under the Individuals with Disabilities Education Act (IDEA), while 2.5% of children aged birth to three receive services through early intervention. Further, data in *Fictional State* indicate that the distribution of various types of special education services differed by race and ethnicity. Moreover, among the students in *Fictional State* served under IDEA, only 63% spent 80% or more of their school day in general classes. These percentages represent a sizable number of children and youth who need additional support through early intervention and special education—and also from their educators, families, and communities.

Survey data in *Fictional State* indicate that parents of students with disabilities feel they lack knowledge of local resources and feel under-involved in their children's early intervention and special education services. In particular, most parents (72%) reported difficulty accessing information about their child's special education and early intervention program. These findings were especially pronounced for families that lived in the most underserved areas. Additionally, in *Fictional State*, there is a gap between the percentage of students with disabilities who pass statewide assessments and students without disabilities. This gap becomes more exaggerated with time as almost 18% of students with disabilities in *Fictional State* drop out of high school.

It is anticipated that if parents receive information and training about their children's disabilities, and learn how to navigate the systems that provide early intervention and special education, they will be better positioned to collaborate with educators and advocate for effective services for their children. In addition, if youth receive similar information and training, they will be increasingly empowered to advocate for themselves, and will ultimately have better educational outcomes.

Purpose: Consistent with the expectations outlined by the Office of Special Education Programs (OSEP), the purpose of the ***Fictional State Parent Training and Information Center*** is to help families:

1. Navigate systems that provide early intervention, special education, general education, postsecondary options, and related services;
2. Understand the nature of their children's disabilities and locate resources;
3. Learn about their rights and responsibilities under the IDEA;
4. Expand their knowledge of evidence-based education practices to help their children succeed;
5. Strengthen their collaboration with professionals;
6. Advocate for improved student achievement, increased graduation rates, and improved postsecondary outcomes for all children through participation in school reform activities; and
7. Help youth with disabilities understand their disabilities and learn how to become effective self-advocates.

Back

Activities in support of these goals include providing:

1. **Information to parents** to build their understanding of their children's disabilities and the systems associated with early intervention and special education service delivery, including information to help parents better understand:
    a. How to help their children meet developmental, academic, and career goals;
    b. Their rights, responsibilities, and protections under IDEA; and
    c. Strategies that can be used to improve services and results for their children;
2. **Training to support parents** in working with their children to help them meet challenging academic achievement goals and prepare them to lead productive, independent adult lives;
3. **Training to help parents** develop the skills necessary to participate in planning and decision-making related to early intervention, special education, and transitional services;
4. **Individual technical assistance (TA)** to support families with particular issues including identification, evaluation, and IEP/IFSP development dispute resolution, among others, including accompanying parents to sessions;
5. **Information to youth** to support them in building understanding of their own disabilities and to become self-advocates; and
6. **Training to support youth** in building understanding of their own disabilities and becoming self-advocates.

The Parent Center will use an email listserv, the website, and social media to reach out to parents and youth who may benefit from their assistance and to provide state- and locality-specific information about early intervention and special education. In addition, Center staff will collaborate and determine methods for reaching underserved parents and youth to ensure that all parents (not just those that are currently engaged) have access to this important information. Trainings will be developed by the *Fictional State Parent Training and Information Center* so that they meet the specific needs of parents and youth in *Fictional State*. Trainings will be delivered online and in-person in each of the six regions of the state. Finally, specialized TA providers at the Center will offer one-on-one technical assistance to parents. Individual technical assistance will be provided to parents who request it and will be delivered using multiple modes of communication, including in-person meetings, phone calls, emails, and text messages. Individual technical assistance will be responsive to the issues that families raise when contacting the center.

The *Fictional State Parent Training and Information Center* website will house all of its informational briefs and offer information about available training programs, as well as opportunities for individual TA.

SAMPLE

LOGIC MODEL

INPUTS	STRATEGIES/ ACTIVITIES	OUTPUTS	OUTCOMES		
			SHORT-TERM	MEDIUM-TERM	LONG-TERM*
Families and youth Funding Research PTI staff PTACs TA providers State and local educational staff	Develop and disseminate information to parents and youth via the website, social media, listerv Provide online and in-person training to parents Provide in-person training to youth Provide individual technical assistance to parents	Number of online training sessions Number of in-person training sessions Number of parents participating in training sessions Number of parents receiving individual technical assistance Number of outreach activities Number of youth participating in in-person training	Increased parental awareness of the nature of their children's disabilities Increased parental awareness of special education and early intervention systems Increased parental awareness of their rights under IDEA Increased parental awareness of evidence-based education practices Increased youth awareness of the nature of their disabilities and their rights under IDEA	Parents have an increased number of strategies to help their children succeed Parents are better able to navigate special education and early intervention systems Parents can use more effective modes of collaboration with educators Youth have an increased number of strategies to advocate for themselves Parents are increasingly connected to their local communities	Parents and educators collaborate to provide improved services to students with disabilities Students with disabilities have greater access to challenging academic content or the general education curriculum Improved long-term outcomes for students with disabilities

External Factors: Federal policy, state policy, LEA support for parental involvement, total hours of training and TA received

* Some Centers may not be able to address their long-term outcomes during their project period. But, these outcomes are represented in the logic model to depict the theory of how the project is expected to achieve its outcomes over time.

Sample Step 1 Template. Summarizing Key Points from the Document Review

Question	Response	Source of Information
1. What is the purpose of your project?	1. Help parents participate effectively in their children's education. 2. Improve outcomes for students with disabilities.	Grant application
2. What are the top 3-4 results you hope to achieve?	1. Parents provide academic support to their children to help them succeed. 2. Parents have increased knowledge of early intervention and special education systems. 3. Youth have an increased number of strategies to advocate for themselves. 4. Students with disabilities have greater access to challenging academic content or the general education curriculum.	Project logic model
2a. How will you know you achieved project results?	1. Results of pre/post parent knowledge assessments. 2. Results of pre/post parent self-report surveys. 3. Results of pre/post youth self-report surveys. 4. The amount of time that students with disabilities spend in the general education classroom.	Evaluation plan
3. What is the evidence base for your project?	1. Surveys show that 72% of parents report difficulty accessing information about their child's early intervention and special education programs. 2. In *Fictional State*, there is a gap between the percentage of students with disabilities who pass statewide assessments compared with students without disabilities. 3. Moreover, among the students in *Fictional State* served under IDEA, only 63% spent 80% or more of their school day in general classes. 4. It is anticipated that if parents and youth receive information and training about will be better positioned to advocate for effective services.	*Fictional State* data
3a. Who is expected to change?	1. Parents are expected to become more aware of how they can be involved in their children's education and help their children succeed. 2. Parents and educators are expected to increase collaboration. 3. Youth are expected to increase their awareness of the nature of their disabilities and their rights under IDEA. 4. Students are expected to have greater access to challenging academic content or the general education curriculum.	Project logic model, evaluation plan
3b. How much change is reasonable to expect?	1. Parents who participate in training or TA demonstrate a 10-point increase on a knowledge assessment from pre- to post-testf educators who participate in TA demonstrate an increase on a knowledge assessment from pre- to post-test. 2. Parents who participate in training or TA demonstrate a 10-point increase on a self-report survey from pre- to post-test. 3. Youth who partcipate in training demonstrate a 10-point increase on a self-report survey from pre- to post- test. 4. Compared to baseline, a 10% increase of students whose parents participated in training or TA who have greater access to challenging academic content or the general education curriculum.	Evaluation plan
3c. Over what time period is the change expected to take place?	1. Changes in short- and medium-term outcomes will be monitored and reported annually. 2. Long-term outcomes that are expected to be met by the end of the project funding period will be tracked annually.	Evaluation plan

Sample Step 2 Template. *Listing Key Project Activities, Outputs, and Outcomes*

Activities	Outputs	Short-term Outcomes	Medium-term Outcomes	Long-term Outcomes
A1. Develop and disseminate information to parents and youth via the website, social media, listerv	O1. Number of parents participating in training sessions	ST1. Increased parental awareness of the nature of their children's disabilities	MT1. Parents are in a better position to help their children succeed	LT1. Parents and educators collaborate to provide improved services to students with disabilities
A2. Provide online and in-person training to parents	O2. Number of parents receiving individual technical assistance	ST2. Increased parental awareness of early intervention and special education systems	MT2. Parents are better able to navigate early intervention and special education systems	LT2. Students with disabilities have greater access to challenging academic content or the general education curriculum
A3. Provide individual technical assistance to parents	O3. Number of youth participating in in-person training sessions	ST3. Increased youth awareness of the nature of their disabilities and their rights under IDEA	MT3. Youth have an increased number of strategies to advocate for themselves	
A4. Provide in-person training to youth				

Sample Step 3 Template A. *Assessing Key Project Activities, Outputs, and Outcomes**

Questions	A1	A2	A3	A4	O1	O2	O3	ST1	ST2	ST3	MT1	MT2	MT3	LT1	LT2
Related to your project's logic model?															
Does this relate to the top one or two purposes for the project? (x 2)	2	2	2	2	0	0	0	2	2	2	2	2	2	2	2
Does this relate to the top issues identified in the literature? (x 2)	0	2	0	0	0	0	0	2	2	0	2	2	2	2	2
Does it relate to a part of the theory of change that is essential for the project's success? (x 2)	2	2	2	2	0	0	0	2	2	2	2	2	2	2	2
Measurable?															
Is it measurable within the current limitations (e.g., resource constraints) of the project?	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1
Does it rely on objective data sources?	0	0	0	0	1	1	1	1	1	1	0	0	0	0	1
Does it rely on existing data (i.e., something the project is already doing or collecting)?	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1
Will data collection and analysis be uncomplicated (i.e., it will not be burdensome)?	0	0	0	0	1	1	1	0	1	1	1	1	1	1	1
Can you assign a value for how much change is expected?	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Can you identify the time frame when the change will occur?	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
Is this item actionable? (i.e., can you make project improvements based on what you learn?)	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1
Meaningful to stakeholders?															
Is this item understandable to a reasonable third party (e.g., outside stakeholder)?	1	1	1	1	0	0	0	1	1	1	1	1	1	1	1
Total per item (max score of 14)	**6**	**8**	**6**	**6**	**6**	**6**	**6**	**12**	**13**	**11**	**12**	**12**	**12**	**13**	**14**

*For each question, enter a "1" in the cell if the answer is "yes" and a "0" if the answer is "no" unless otherwise indicated. Some indicators are more critical to project success than others. Questions related to the critical indicators are weighted double the value (you will enter a "2" in these cells). The total maximum score across all items is 14.

Activities (A)
A1. Develop and disseminate information to parents and youth via the website, social media, listserv
A2. Provide online and in-person training to parents
A3. Provide individual technical assistance to parents
A4. Provide in-person training to youth

Outputs (O)
O1. Number of parents participating in training sessions
O2. Number of parents receiving individual technical assistance
O3. Number of youth participating in in-person training sessions

Short-term Outcomes (ST)
ST1. Increased parental awareness of the nature of their children's disabilities
ST2. Increased parental awareness of special education and early intervention systems
ST3. Increased youth awareness of the nature of their disabilities and their rights under IDEA

Medium-term Outcomes (MT)
MT1. Parents are in a better position to help their children succeed
MT2. Parents are better able to navigate special education and early intervention systems
MT3. Youth have an increased number of strategies to advocate for themselves

Long-term Outcomes (LT)
LT1. Parents and educators collaborate to provide improved services to students with disabilities
LT2. Students with disabilities have greater access to challenging academic content or the general education curriculum

Sample Step 3 Template B. *Identifying Key Items to Use as Potential Project Measures*

Type (e.g., Activity, Output, Short-, Mid-, or Long-term Outcome)	Item
Activity	Provide online and in-person training to parents
Short-term outcome	Increased parental awareness of the nature of their children's disabilities
Short-term outcome	Increased parental awareness of early intervention and special education systems
Short-term outcome	Increased youth awareness of the nature of their disabilities and their rights under IDEA
Medium-term outcome	Parents are in a better position to help their children succeed
Medium-term outcome	Parents are better able to navigate early intervention and special education systems
Medium-term outcome	Youth have an increased number of strategies to advocate for themselves
Long-term outcome	Parents and educators collaborate to provide improved services to students with disabilities
Long-term outcome	Students with disabilities have greater access to challenging academic content or the general education curriculum

Sample Step 4 Template. *Creating a Final List of Items for Use as Performance Measures*

Type	Item Text
Short-term outcome	Increased parental awareness of early intervention and special education systems
Medium-term outcome	Parents are in a better position to help their children succeed
Medium-term outcome	Youth have an increased number of strategies to advocate for themselves
Long-term outcome	Parents and educators collaborate to provide improved services to students with disabilities
Long-term outcome	Students with disabilities have greater access to challenging academic content or the general education curriculum

Sample Step 5 Template. *Drafting Final Performance Measure Language*

Type	Initial Item Text	What?	Who?	How Much?	When?	Final Project Performance Measure Text
Short-term outcome	Increased parental awareness of special education and early intervention systems	Awareness of special education and early intervention systems	Parents of students with disabilities	5-point increase	At the beginning and end of online and in-person training sessions	Percentage of parents who participate in online or in-person training and increase their knowledge related to special education and early intervention systems by 5 points as measured on a knowledge assessment at the beginning and end of each training, between grant years 1 and 5
Medium-term outcome	Parents are in a better position to help their children succeed	Ability to support the success of students with disabilities	Parents of students with disabilities	5-point increase	From when parents received TA to 9 months later.	Percentage of parents who participate in online or in-person training or individual technical assistance who achieve a 5-point increase on a self-report[1] survey from when parents received TA to 9 months later, between grant years 1 and 5
Medium-term outcome	Youth have an increased number of strategies to advocate for themselves	Awareness of advocacy strategies	Youth with disabilities	5-point increase	From when youth received training to 9 months later.	Percentage of youth who participate in in-person training who achieve a 5-point increase on a self-report survey from when parents received TA to 9 months later, between grant years 1 and 5
Long-term outcome	Parents and educators collaborate to provide improved services to students with disabilities	Collaboration to provide improved services to students with disabilities	Parents of students with disabilities	5-point increase	From when parents received training/TA to 9 months later.	Percentage of parents who participate in online or in-person training or individual technical assistance who achieve a 5-point increase on a self-report survey[1] from when parents received TA to 9 months later, between grant years 1 and 5
Long-term outcome	Students with disabilities have greater access to challenging academic content or the general education curriculum	Access to challenging academic content or the general education curriculum	Students with disabilities	10% increase over baseline	From the end of one school year to the end of the next school year	The percentage of students with disabilities whose parents participate in training or technical assistance through the PTIC and who have greater access to challenging academic content or the general education curriculum

1. The self-report survey includes items that measure 1) the extent to which parents provide academic support to their children, and 2) the extent of parent-teacher collaboration.