



**NCPCRO**

**NC Pandemic Recovery Office**

# **KPI INTAKE SURVEY TRAINING**

Updated May 12, 2023

# Roadmap for KPI Intake Training



**Review of Key Information &  
Recommended Procedures**



**KPI Intake Survey Walkthrough**



**Open for Questions**

# Make sure you don't miss the survey!

- Add **@smartsheetgov.com** to the trusted sender list in Outlook
- Check your **junk** folder!
- If the email is in your junk folder, move the email **to your inbox** before proceeding.
- If email can't be found, **contact** your **NCPRO grants manager** asap.

# Recommended Order of Operations

1

**REVIEW:**

Before opening the survey link, click the resource link and review the [KPI Intake Survey Resource Guide](#) and [KPI Intake Survey Questions Template](#)

# Recommended Order of Operations

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- 2 PREPARE:** Using the Template, prepare your responses prior to opening the survey. Refer to other planning tools (logic model, project planning template, etc.)

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- 3 INPUT:** Open the survey link in the email to access the survey and copy and paste drafted responses from the Template

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- 4 SUBMIT:** Click the "Submit Update" button to submit your survey!




# 1. Review - Click the resource link BEFORE clicking the survey link

[External] KPI Intake Survey

 Brenda Smith via Smartsheet <automation@smartsheet.com>  
To:  Garrett, Natalie

  Reply  Reply All  Forward  

Tue 5/9/2023 10:40 AM

 If there are problems with how this message is displayed, click here to view it in a web browser.

**CAUTION:** External email. Do not click links or open attachments unless verified. Report suspicious emails with the Report Message button located on your Outlook menu bar on the Home tab.

Dear SFRF Recipient,

This email contains a link for you to complete NCPRO's Key Performance Indicator (KPI) Intake Survey for **[SFRF Project ID]**

Please follow these steps to complete the KPI Intake Survey (due by May 26th, 2023):

1. Before clicking the survey link, please go to <https://ncpro.nc.gov/guidance/reporting-information> to access guidance documents and templates that will facilitate completion of the survey. These resources contain critical information for completing the survey and will save you considerable time and effort.
2. Review KPI Intake Survey Guidance document (found in link above).
3. Download the KPI Intake Survey Template (found in link above).
4. Gather recommended documentation (including completed Logic Models) to facilitate answering survey questions.
5. Answer all questions in the KPI Intake Survey Template.
6. THEN click to open the survey link in this email (the blue button that says "Open Update Form" below this text) and copy and paste your responses from the template to the survey.
7. Click "Submit" when finished.

Please use your project's performance measure logic model to help answer these questions. Therefore, if you have not developed the performance measurement logic model, it is strongly recommended your agency complete that first, then use the logic model as one of your reference documents to help you complete the survey.

The survey does not save partial progress. If you enter data and close the browser before submitting, you will need to start over. Once you submit the survey, your access link will expire. If you need to make changes to what you submitted, please contact Erik Miller and a new survey link will be sent to you to make updates.

Thank you in advance for providing information on the KPIs you will be using for your SFRF project. If you need assistance or have questions, please feel free to reach out to Erik Miller.

[Open Update Form](#)

# 1. Review - Open and review the Resource Guide and Download the Template

## SFRF Performance Reporting

### KPI Intake Guidance

Updated as of May 5, 2023

#### KPI Intake Survey Resource Guide

This document is designed to assist SFRF recipients when completing the KPI Intake Survey. It contains instructions for accessing and submitting the survey, tips on developing effective KPIs, definitions of key terminology, and information on additional resources.

[KPI Intake Survey Resource Guide](#)

#### KPI Intake Survey Questions Template

This document is designed as a tool for recipients to gather KPI information and draft survey responses prior to accessing the survey link. Recipients can then copy and paste responses from this template into the actual KPI Intake Survey for submission.

[KPI Intake Survey Questions Template](#)

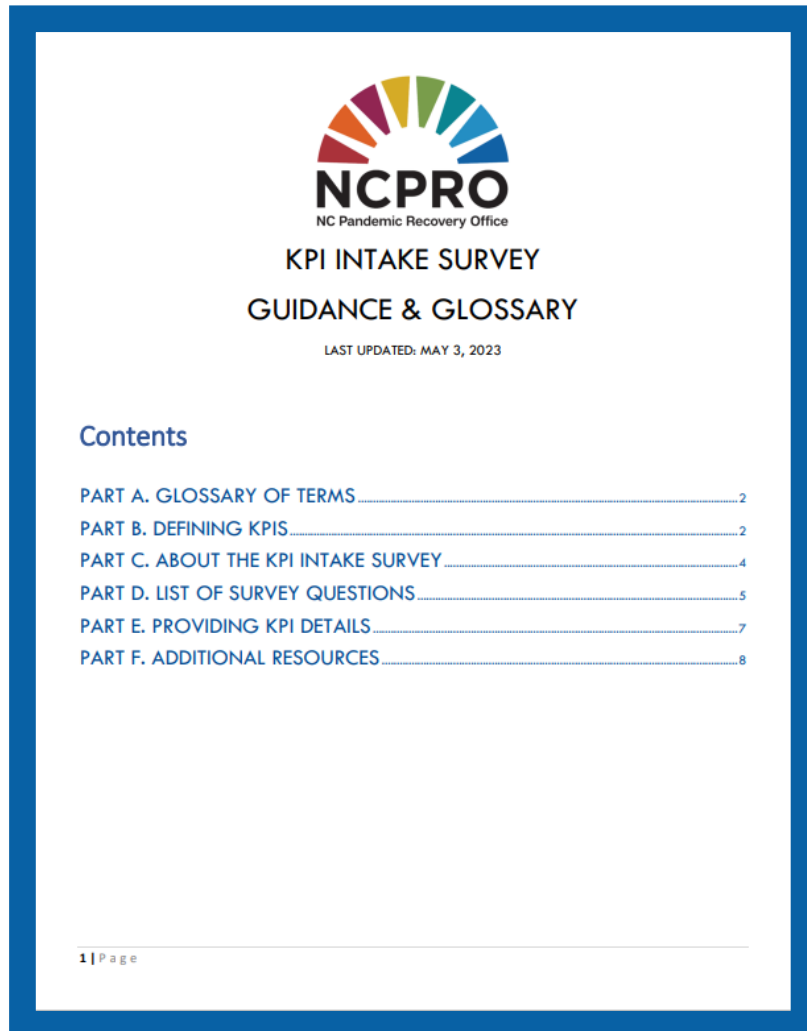
#### KPI Intake Survey Questions Template SAMPLE PROJECT

This document contains an example of a completed KPI Intake Survey Template. The example project is fictitious and any similarity to any real SFRF project is purely coincidental.

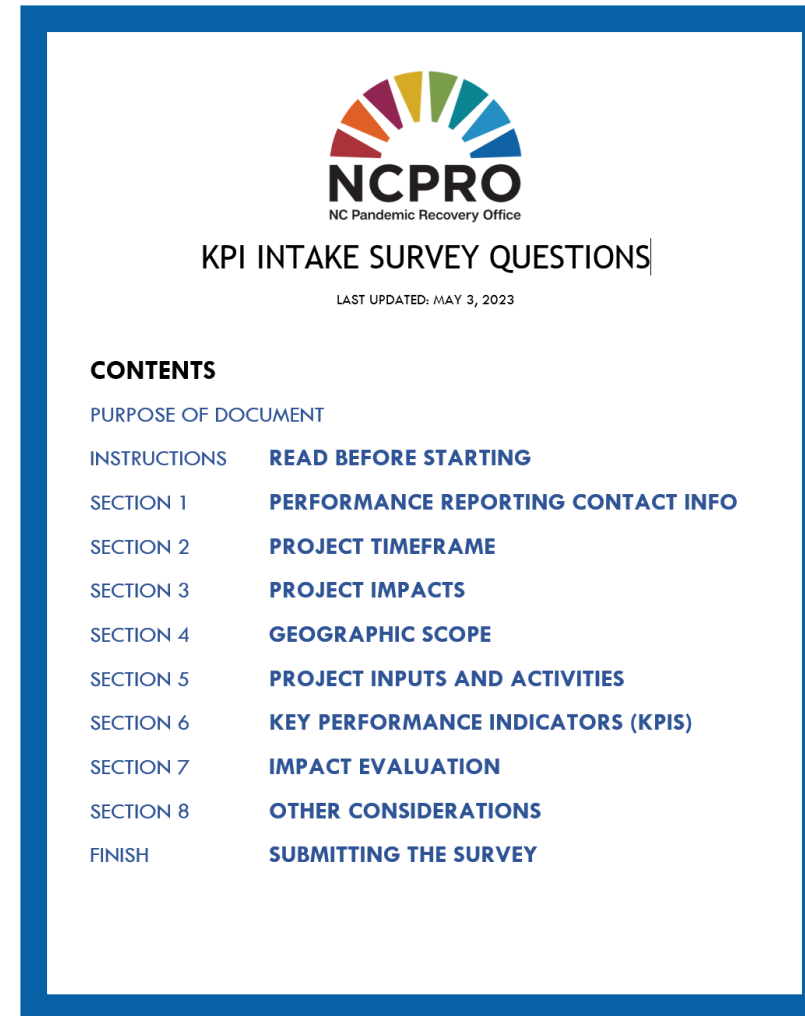
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# 1. Review - Open and review the Resource Guide and Download the Template

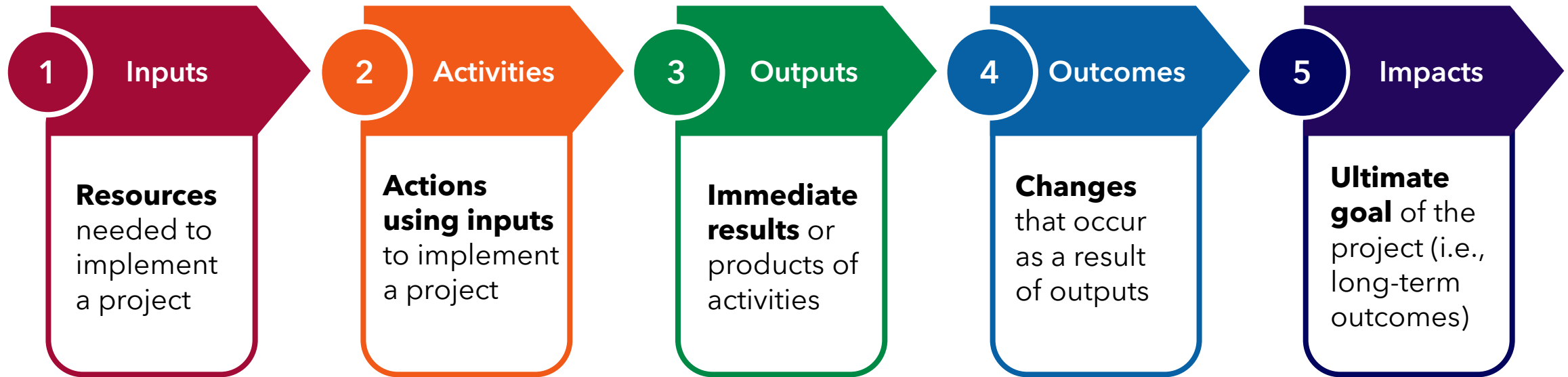
## Resource Guide



## Survey Questions Template



# 1. Review - Project Flow



# 1. Review - KPI Terms

1

## Tracking Measures

Metrics that help you track the **implementation** of your project. These may include **your inputs, activities, or similar milestones**.

2

## Output Measures

Metrics that help measure the **direct results** of your actions. They provide valuable information about the early implementation stages of a project.

3

## Outcome Measures

Metrics that measure **changes that occur** as a result of the project's activities. They indicate whether a project is achieving its overall goals.

# 1. Review - Logic Model

		PLANNED WORK		INTENDED RESULTS		
		Inputs	Activities	Outputs	Outcome	Agency/Project's Impact
PROJECT PHASE						
RELEVANT MEASURES	Project Tracking Measures	Output Measures		Outcome Measures		

# 1. Review - Logic Model “Community Health Project”

	PLANNED WORK		INTENDED RESULTS		
	Inputs	Activities	Outputs	Outcome	Agency/Project's Impact
DEFINITIONS	<ul style="list-style-type: none"> <li>• Staff to develop workshops</li> <li>• Instructional materials</li> <li>• Workshop locations</li> <li>• Outreach materials</li> <li>• Staff to administer the workshops</li> <li>• Follow-up Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Conducting outreach</li> <li>• Conducting workshops</li> <li>• Developing and conducting surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Health workshops are successfully carried out throughout the state</li> <li>• Workshops effectively reach targeted community</li> <li>• Follow-up surveys launched</li> </ul>	<ul style="list-style-type: none"> <li>• Attendees found the workshops valuable</li> <li>• Attendees adopt healthier habits and behaviors following workshops</li> </ul>	<p>We hope that the project will positively impact health outcomes for North Carolinians by providing them greater access to wellness workshops and other learning opportunities that will result in long-term healthier habits. We are particularly concerned with targeting households underneath the federal poverty line.</p>
RELEVANT MEASURES	<p><b>Project Tracking Measures</b></p> <ul style="list-style-type: none"> <li>• Number of staff hired to develop workshops</li> <li>• Number of staff hired to administer workshops</li> <li>• Number of radio/newspaper ads promoting the workshops (published)</li> <li>• Number of households contacted and invited to participate in workshops</li> <li>• Curriculum completion rate</li> <li>• Percent of total needed workshop locations secured (completed contracts)</li> </ul>	<p><b>Output Measures</b></p> <ul style="list-style-type: none"> <li>• Number of people who attended health workshops</li> <li>• Number of participants who belonged to the targeted community (people who belong to households that are below the federal poverty line)</li> <li>• Number of planned workshops that were completed</li> <li>• Number of hours of workshops completed</li> <li>• Number of attendees who completed follow-up survey</li> <li>• Percent of total surveys analyzed</li> </ul>	<p><b>Outcome Measures</b></p> <ul style="list-style-type: none"> <li>• Percent of workshop attendees that report healthier habits 1 month after the workshop</li> <li>• Percent of workshop attendees that report healthier habits 1 year after the workshop</li> </ul>		

## 2. Prepare - Survey Template



### KPI INTAKE SURVEY QUESTIONS

LAST UPDATED: MAY 3, 2023

#### CONTENTS

PURPOSE OF DOCUMENT

INSTRUCTIONS	<b>READ BEFORE STARTING</b>
SECTION 1	<b>PERFORMANCE REPORTING CONTACT INFO</b>
SECTION 2	<b>PROJECT TIMEFRAME</b>
SECTION 3	<b>PROJECT IMPACTS</b>
SECTION 4	<b>GEOGRAPHIC SCOPE</b>
SECTION 5	<b>PROJECT INPUTS AND ACTIVITIES</b>
SECTION 6	<b>KEY PERFORMANCE INDICATORS (KPIs)</b>
SECTION 7	<b>IMPACT EVALUATION</b>
SECTION 8	<b>OTHER CONSIDERATIONS</b>
FINISH	<b>SUBMITTING THE SURVEY</b>





# Survey Section 1: Performance Reporting Contact Info

Reporting performance measures to NCPRO requires submitting Key Performance Indicator (KPI) data to NCPRO via a **quarterly**, **semi-annual**, and/or **annual** survey. Please provide contact information for the person who will be available to provide accurate and up-to-date performance data on these surveys.

QUESTION	ANSWER
1. Who will report to NCPRO on performance?	Franklin D Roosevelt
2. Title/position of performance measure contact	Project Lead
3. Email address of performance measure contact	fdroosevelt@agency.gov
4. Phone # of performance measure contact	800-300-4000

# Survey Section 2: Project Timeframe

Please select *the appropriate quarter* for each question in this section.

QUESTION	ANSWER
5. When do you expect to <b>complete</b> this project?	2026 Quarter 1 (Jan-Mar)
6. Estimate when <b>25%</b> of SFRF \$ will be <b>obligated</b>	2022 Quarter 3 (Jul - Sep)
7. Estimate when <b>50%</b> of SFRF \$ will be <b>obligated</b>	2023 Quarter 2 (Apr-Jun)
8. Estimate when <b>75%</b> of SFRF \$ will be <b>obligated</b>	2024 Quarter 1 (Jan - Mar)
9. Estimate when <b>100%</b> of SFRF \$ will be <b>obligated</b>	2024 Quarter 4 (Oct-Dec)
10. Estimate when <b>25%</b> of SFRF \$ will be <b>expended</b>	2022 Quarter 4 (Oct-Dec)
11. Estimate when <b>50%</b> of SFRF \$ will be <b>expended</b>	2023 Quarter 3 (Jun-Sep)
12. Estimate when <b>75%</b> of SFRF \$ will be <b>expended</b>	2024 Quarter 2 (Apr-Jun)
13. Estimate when <b>100%</b> of SFRF \$ will be <b>expended</b>	2026 Quarter 1 (Jan- Mar)

# Survey Section 3: Project Impacts

Think about the **overall, long-term impact** you anticipate your project to have and **when this impact is expected**:

QUESTION	ANSWER
<p>14. Describe the <b>expected overall impact</b> of the project</p> <p><i>Response Format: Text</i> <i>Expected length: 2-5 sentences.</i></p>	<p>We hope that the project will positively impact health outcomes for North Carolinians by providing them greater access to wellness workshops and other learning opportunities that will result in long-term healthier habits. We are particularly concerned with targeting households underneath the federal poverty line.</p>
<p>15. <b>When</b> do you expect the <b>project impact</b> to be realized?</p> <p><i>Response format: Drop-down menu with the following options:</i> <i>Short-term (&lt;2 years), intermediate-term (2-5 years), or long-term (&gt;5 years).</i></p>	<p>Intermediate-Term (2-5 years)</p>

← Straight from the logic model!

# Survey Section 4: Geographic Scope

Think about whether your project affects **only specific counties** or **all of North Carolina**.

QUESTION	ANSWER
<p>16. What <b>area(s)</b> of NC does your project impact?</p> <p><i>Response Format: Drop-down menu listing all counties and a "statewide" option</i></p>	<p>Chatham, Durham, Johnston, Lee, Moore, Orange, and Wake</p>

# Survey Section 5: Project Inputs and Activities


Focus on major **inputs** and **activities** for your project.

	PLANNED WORK		INTENDED RESULTS	
	Inputs	Activities	Outputs	Outcome
<b>DEFINITIONS</b>	<ul style="list-style-type: none"> <li>• Staff to develop workshops</li> <li>• Instructional materials</li> <li>• Workshop locations</li> <li>• Outreach materials</li> <li>• Staff to administer the workshops</li> <li>• Follow-up Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Conducting outreach</li> <li>• Conducting workshops</li> <li>• Developing and conducting surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Health workshops are successfully carried out throughout the state</li> <li>• Workshops effectively reach targeted community</li> <li>• Follow-up surveys launched</li> </ul>	<ul style="list-style-type: none"> <li>• Attendees found the workshops valuable</li> <li>• Attendees adopt healthier habits and behaviors following workshops</li> </ul>

# Survey Section 5: Project Inputs and Activities

Focus on major **inputs** and **activities** for your project.

QUESTION	ANSWER
17. List <b>major</b> project inputs	Staff to administer the workshops, outreach materials, instructional documents, surveys, and workshop locations
18. List <b>major</b> project activities	Conducting outreach, conducting workshops, developing and conducting surveys



Pick the most critical inputs and activities from the logic model!

## Survey Section 6: Key Performance Indicators (KPIs)

*For this section, look back at your logic model, and think about which performance measures you listed best demonstrate project **progress** and/or **success**. **These are your KEY Performance Indicators (KPIs)!***

*Note:*

- We anticipate around **3-7 KPIs** for each project.*
- Your KPIs can be any combination of **Tracking Measures, Output Measures, or Outcome Measures**, but it is ideal to have **at least one of each**.*
- If you have more than 10, please contact your grant manager.*

# Survey Section 6: Key Performance Indicators (KPIs)

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**Agency/Project's Impact**

We hope that the project will positively impact health outcomes for North Carolinians by providing them greater access to wellness workshops and other learning opportunities that will result in long-term healthier habits. We are particularly concerned with targeting households underneath the federal poverty line.



# Survey Section 6: Key Performance Indicators (KPIs)

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# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 1 TABLE</b> <b>"Household Outreach"</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Name of measure</b> <i>Response Format: Text</i>	Household outreach
<b>Type of measure</b> <i>Response format: Drop-down menu with the following options: Tracking, Output, or Outcome</i>	Tracking Measure
<b>Brief description</b> <i>Response Format: Text Expected length: 1 to 3 sentences</i>	Number of households contacted and invited to participate in workshops

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 1 TABLE</b> <b>"Household Outreach" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Unit of measurement</b> <i>Response Format: Text</i> <i>Expected length: 3-5 words</i>	Number of households
<b>Measuring Strategy/ Data Source</b> <i>Response Format: Text</i> <i>Expected length: 1 or 2 sentences</i>	List of applicable households that had been called on the phone with a record of whether someone picked up the phone

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 1 TABLE</b> <b>"Household Outreach" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Measure start date</b> <i>Response Format: Drop-down menu with list of quarters</i>	2022 Quarter 4 (Oct-Dec)
<b>Measure end date</b> <i>Response Format: Drop-down menu with list of quarters</i>	2024 Quarter 2 (Apr-Jun)
<b>Frequency of reporting to NCPRO</b> <i>Response format: Drop-down menu with the following options: Quarterly, Semi-annually, Annually</i>	Quarterly

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 1 TABLE</b> <b>"Household Outreach" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<p><b>Does KPI have an equity component?</b> <i>Equity is defined by OSBM as "ensuring opportunities, access, and impact are not determined by race, ethnicity, gender, language, socioeconomic status, religion, or ability."</i> Response format: Yes/no Drop-down menu</p>	<p>Yes</p>
<p><b>How is KPI data disaggregated?</b> <i>Describe if your KPI data is (or can be) disaggregated across equity dimensions including race, socioeconomic status, gender, ethnicity, ability, etc. If it is not disaggregated, state "KPI data not disaggregated"</i> Response format: text</p>	<p>Addresses are associated with zip codes and census tract, which can be used to determine socioeconomic status.</p>

# Survey Section 6: Key Performance Indicators (KPIs)

	PLANNED WORK		INTENDED RESULTS	
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DEFINITIONS	<ul style="list-style-type: none"> <li>Staff to develop workshops</li> <li>Instructional materials</li> <li>Workshop locations</li> <li>Outreach materials</li> <li>Staff to administer the workshops</li> <li>Follow-up Surveys</li> </ul>	<ul style="list-style-type: none"> <li>Conducting outreach</li> <li>Conducting workshops</li> <li>Developing and conducting surveys</li> </ul>	<ul style="list-style-type: none"> <li>Health workshops are successfully carried out throughout the state</li> <li>Workshops effectively reach targeted community</li> <li>Follow-up surveys launched</li> </ul>	<ul style="list-style-type: none"> <li>Attendees found the workshops valuable</li> <li>Attendees adopt healthier habits and behaviors following workshops</li> </ul>
RELEVANT MEASURES	Project Tracking Measures	Output Measures		Outcome Measures
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**Agency/Project's Impact**

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# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 2 TABLE</b> <b>"Curriculum Completion Rate"</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Name of measure</b> <i>Response Format: Text</i>	Curriculum completion rate
<b>Type of measure</b> <i>Response format: Drop-down menu with the following options: Tracking, Output, or Outcome</i>	Tracking Measure
<b>Brief description</b> <i>Response Format: Text</i> <i>Expected length: 1 to 3 sentences</i>	Percent of total workshop curriculum developed

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 2 TABLE</b> <b>"Curriculum Completion Rate" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Unit of measurement</b> <i>Response Format: Text</i> <i>Expected length: 3-5 words</i>	<b>Percent</b> of curriculum completed
<b>Measuring Strategy/ Data Source</b> <i>Response Format: Text</i> <i>Expected length: 1 or 2 sentences</i>	Monthly internal progress report containing Project manager's log of curriculum development progress



# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 2 TABLE</b> <b>"Curriculum Completion Rate" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Measure start date</b> <i>Response Format: Drop-down menu with list of quarters</i>	2022 Quarter 3 (Jul - Sep)
<b>Measure end date</b> <i>Response Format: Drop-down menu with list of quarters</i>	2022 Quarter 4 ( Oct-Dec )
<b>Frequency of reporting to NCPRO</b> <i>Response format: Drop-down menu with the following options: Quarterly, Semi-annually, Annually</i>	Quarterly

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 2 TABLE</b> <b>"Curriculum Completion Rate" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<p><b>Does KPI have an equity component?</b> <i>Equity is defined by OSBM as "ensuring opportunities, access, and impact are not determined by race, ethnicity, gender, language, socioeconomic status, religion, or ability."</i> <i>Response format: Yes/no Drop-down menu</i></p>	<p>Yes</p>
<p><b>How is KPI data disaggregated?</b> <i>Describe if your KPI data is (or can be) disaggregated across equity dimensions including race, socioeconomic status, gender, ethnicity, ability, etc. If it is not disaggregated, state "KPI data not disaggregated"</i> <i>Response format: text</i></p>	<p>The curriculum will be made accessible to the hearing impaired and available in multiple languages.</p>

# Survey Section 6: Key Performance Indicators (KPIs)

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DEFINITIONS	<ul style="list-style-type: none"> <li>Staff to develop workshops</li> <li>Instructional materials</li> <li>Workshop locations</li> <li>Outreach materials</li> <li>Staff to administer the workshops</li> <li>Follow-up Surveys</li> </ul>	<ul style="list-style-type: none"> <li>Conducting outreach</li> <li>Conducting workshops</li> <li>Developing and conducting surveys</li> </ul>	<ul style="list-style-type: none"> <li>Health workshops are successfully carried out throughout the state</li> <li>Workshops effectively reach targeted community</li> <li>Follow-up surveys launched</li> </ul>	<ul style="list-style-type: none"> <li>Attendees found the workshops valuable</li> <li>Attendees adopt healthier habits and behaviors following workshops</li> </ul>
RELEVANT MEASURES	Project Tracking Measures	Output Measures		Outcome Measures
	<ul style="list-style-type: none"> <li>Number of staff hired to develop workshops</li> <li>Number of staff hired to administer workshops</li> <li>Number of radio/newspaper ads promoting the workshops (published)</li> <li>Number of households contacted and invited to participate in workshops</li> <li>Curriculum completion rate</li> <li>Percent of total needed workshop locations secured (completed contracts)</li> </ul>	<ul style="list-style-type: none"> <li><b>Number of people who attended health workshops</b></li> <li>Number of participants who belonged to the targeted community (people who belong to households that are below the federal poverty line)</li> <li>Number of planned workshops that were completed</li> <li>Number of hours of workshops completed</li> <li>Number of attendees who completed follow-up survey</li> <li>Percent of total surveys analyzed</li> </ul>		<ul style="list-style-type: none"> <li>Percent of workshop attendees that report healthier habits 1 month after the workshop</li> <li>Percent of workshop attendees that report healthier habits 1 year after the workshop</li> </ul>

**Agency/Project's Impact**

We hope that the project will positively impact health outcomes for North Carolinians by providing them greater access to wellness workshops and other learning opportunities that will result in long-term healthier habits. We are particularly concerned with targeting households underneath the federal poverty line.

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 3 TABLE</b> <b>"Attendance"</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Name of measure</b> <i>Response Format: Text</i>	Attendance
<b>Type of measure</b> <i>Response format: Drop-down menu with the following options: Tracking, Output, or Outcome</i>	Output Measure
<b>Brief description</b> <i>Response Format: Text</i> <i>Expected length: 1 to 3 sentences</i>	Number of people who attended the SFRF funded health workshops

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 3 TABLE</b> <b>"Attendance" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Unit of measurement</b> <i>Response Format: Text</i> <i>Expected length: 3-5 words</i>	Number of attendees
<b>Measuring Strategy/ Data Source</b> <i>Response Format: Text</i> <i>Expected length: 1 or 2 sentences</i>	Attendee registration log

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 3 TABLE</b> <b>"Household Outreach" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Measure start date</b> <i>Response Format: Drop-down menu with list of quarters</i>	2023 Quarter 3 (Jun-Sep)
<b>Measure end date</b> <i>Response Format: Drop-down menu with list of quarters</i>	2026 Quarter 1 (Jan- Mar)
<b>Frequency of reporting to NCPRO</b> <i>Response format: Drop-down menu with the following options: Quarterly, Semi-annually, Annually</i>	Quarterly

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 3 TABLE</b> <b>"Attendance" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<p><b>Does KPI have an equity component?</b> <i>Equity is defined by OSBM as "ensuring opportunities, access, and impact are not determined by race, ethnicity, gender, language, socioeconomic status, religion, or ability." Response format: Yes/no Drop-down menu</i></p>	<p>Yes</p>
<p><b>How is KPI data disaggregated?</b> <i>Describe if your KPI data is (or can be) disaggregated across equity dimensions including race, socioeconomic status, gender, ethnicity, ability, etc. If it is not disaggregated, state "KPI data not disaggregated" Response format: text</i></p>	<p>Demographic information will be collected in the registration and exit survey</p>

# Survey Section 6: Key Performance Indicators (KPIs)

	PLANNED WORK		INTENDED RESULTS	
	Inputs	Activities	Outputs	Outcome
DEFINITIONS	<ul style="list-style-type: none"> <li>Staff to develop workshops</li> <li>Instructional materials</li> <li>Workshop locations</li> <li>Outreach materials</li> <li>Staff to administer the workshops</li> <li>Follow-up Surveys</li> </ul>	<ul style="list-style-type: none"> <li>Conducting outreach</li> <li>Conducting workshops</li> <li>Developing and conducting surveys</li> </ul>	<ul style="list-style-type: none"> <li>Health workshops are successfully carried out throughout the state</li> <li>Workshops effectively reach targeted community</li> <li>Follow-up surveys launched</li> </ul>	<ul style="list-style-type: none"> <li>Attendees found the workshops valuable</li> <li>Attendees adopt healthier habits and behaviors following workshops</li> </ul>
RELEVANT MEASURES	Project Tracking Measures	Output Measures		Outcome Measures
	<ul style="list-style-type: none"> <li>Number of staff hired to develop workshops</li> <li>Number of staff hired to administer workshops</li> <li>Number of radio/newspaper ads promoting the workshops (published)</li> <li>Number of households contacted and invited to participate in workshops</li> <li>Curriculum completion rate</li> <li>Percent of total needed workshop locations secured (completed contracts)</li> </ul>	<ul style="list-style-type: none"> <li>Number of people who attended health workshops</li> <li>Number of participants who belonged to the targeted community (people who belong to households that are below the federal poverty line)</li> <li>Number of planned workshops that were completed</li> <li>Number of hours of workshops completed</li> <li>Number of attendees who completed follow-up survey</li> <li>Percent of total surveys analyzed</li> </ul>		<ul style="list-style-type: none"> <li><b>Percent of workshop attendees that report healthier habits 1 month after the workshop</b></li> <li>Percent of workshop attendees that report healthier habits 1 year after the workshop</li> </ul>

**Agency/Project's Impact**

We hope that the project will positively impact health outcomes for North Carolinians by providing them greater access to wellness workshops and other learning opportunities that will result in long-term healthier habits. We are particularly concerned with targeting households underneath the federal poverty line.



# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 4 TABLE</b> <b>"Healthier Habits - One Month"</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Name of measure</b> <i>Response Format: Text</i>	Healthier Habits After One Month
<b>Type of measure</b> <i>Response format: Drop-down menu with the following options: Tracking, Output, or Outcome</i>	Outcome Measure
<b>Brief description</b> <i>Response Format: Text</i> <i>Expected length: 1 to 3 sentences</i>	Percent of workshop attendees that report healthier habits 1 month after the workshop

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 4 TABLE</b> <b>"Healthier Habits - One Month" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Unit of measurement</b> <i>Response Format: Text</i> <i>Expected length: 3-5 words</i>	Percent of total attendees
<b>Measuring Strategy/ Data Source</b> <i>Response Format: Text</i> <i>Expected length: 1 or 2 sentences</i>	A survey asking about habits to be administered as a baseline before attendance with a follow-up survey to gauge how habits might have changed after workshop attendance

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 4 TABLE</b> <b>"Healthier Habits - One Month" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<b>Measure start date</b> <i>Response Format: Drop-down menu with list of quarters</i>	2023 Quarter 3 (Jun-Sep)
<b>Measure end date</b> <i>Response Format: Drop-down menu with list of quarters</i>	2026 Quarter 1 (Jan- Mar)
<b>Frequency of reporting to NCPRO</b> <i>Response format: Drop-down menu with the following options: Quarterly, Semi-annually, Annually</i>	Semi-annually

# Survey Section 6: Key Performance Indicators (KPIs)

<b>KPI 4 TABLE</b>	
<b>"Healthier Habits - One Month" (Cont.)</b>	
<b>QUESTION</b>	<b>ANSWER</b>
<p><b>Does KPI have an equity component?</b> <i>Equity is defined by OSBM as "ensuring opportunities, access, and impact are not determined by race, ethnicity, gender, language, socioeconomic status, religion, or ability."</i> Response format: Yes/no Drop-down menu</p>	<p>Yes</p>
<p><b>How is KPI data disaggregated?</b> <i>Describe if your KPI data is (or can be) disaggregated across equity dimensions including race, socioeconomic status, gender, ethnicity, ability, etc.</i> <i>If it is not disaggregated, state "KPI data not disaggregated"</i> Response format: text</p>	<p>Survey data can be disaggregated by a variety of demographic indicators, including race and socioeconomic status</p>

# Survey Section 7: Impact Evaluation

Think about whether you will be conducting an **evaluation of the overall, long-term impacts of your project**, and let us know if you would be interested in collaborating with NCPRO and/or agency partners to evaluate project impacts.

QUESTION	ANSWER
20. Do you plan to evaluate project impacts? <i>Response format: Yes/No Drop-down menu</i>	Yes
21. Are you interested in evaluation collaboration? <i>Response format: Yes/No Drop-down menu</i>	Yes

# Survey Section 8: Other Considerations

Please share any additional **thoughts, concerns, or questions** you have regarding your project KPIs.

QUESTION	ANSWER
22. Provide any additional info on KPIs here <i>Response format: Text</i>	We are confident that our KPIs are suitable for measuring the overall success of my project, however we have lingering concerns about our ability to collect the necessary data. We are also curious to know if other projects have similar measures.

### 3. Input - You are ready to open the survey link!

Dear SFRF Recipient,

This email contains a link for you to complete NCPRO's Key Performance Indicator (KPI) Intake Survey for [SFRF Project ID]. Please follow these steps to complete the KPI Intake Survey (due by May 26th, 2023):

**SFRF Project ID**

1. Before clicking the survey link, please go to <https://ncpro.nc.gov/guidance/reporting-information> to access guidance documents and templates that will facilitate completion of the survey. These resources contain critical information for completing the survey and will save you considerable time and effort.
2. Review KPI Intake Survey Guidance document (found in link above).
3. Download the KPI Intake Survey Template (found in link above).
4. Gather recommended documentation (including completed Logic Models) to facilitate answering survey questions.
5. Answer all questions in the KPI Intake Survey Template.
6. THEN click to open the survey link in this email (the blue button that says "Open Update Form" below this text) and copy and paste your responses from the template to the survey.
7. Click "Submit" when finished.

Please use your project's performance measure logic model to help answer these questions. Therefore, if you have not developed the performance measurement logic model, it is strongly recommended your agency complete that first, then use the logic model as one of your reference documents to help you complete the survey.

The survey does not save partial progress. If you enter data and close the browser before submitting, you will need to start over. Once you submit the survey, your access link will expire. If you need to make changes to what you submitted, please contact Erik Miller and a new survey link will be sent to you to make updates.

Thank you in advance for providing information on the KPIs you will be using for your SFRF project. If you need assistance or have questions, please feel free to reach out to Erik Miller.

[Open Update Form](#)

# 3. Input - Copy and paste your drafted responses from the Template

smartsheet | gov

## KPI Intake Survey

Dear SFRF Recipient,

This email contains a link for you to complete NCPRO's Key Performance Indicator (KPI) Intake Survey for SFRF Project OSBM-AUGUSTINE-171. Please follow these steps to complete the KPI Intake Survey (due by May 26th, 2023):

1. Before clicking the survey link, please go to <https://ncpro.nc.gov/guidance/reporting-information> to access guidance documents and templates that will facilitate completion of the survey. These resources contain critical information for completing the survey and will save you considerable time and effort.
2. Review KPI Intake Survey Guidance document (found in link above).
3. Download the KPI Intake Survey Template (found in link above).
4. Gather recommended documentation (including completed Logic Models) to facilitate answering survey questions.
5. Answer all questions in the KPI Intake Survey Template.
6. THEN click to open the survey link in this email (the blue button that says "Open Update Form" below this text) and copy and paste your responses from the template to the survey.
7. Click "Submit" when finished.

Please use your project's performance measure logic model to help answer these questions. Therefore, if you have not developed the performance measurement logic model, it is strongly recommended your agency complete that first, then use the logic model as one of your reference documents to help you complete the survey.

The survey does not save partial progress. If you enter data and close the browser before submitting, you will need to start over. Once you submit the survey, your access link will expire. If you need to make changes to what you submitted, please contact Erik Miller and a new survey link will be sent to you to make updates.

Thank you in advance for providing information on the KPIs you will be using for your SFRF project. If you need assistance or have questions, please feel free to reach out to Erik Miller.

**NCPRO CONTRACT NUMBER**

**Grantee Name**

**Description**

**Grant Manager**

### SECTION 1: KPI REPORTING CONTACT INFO

Reporting performance measures to NCPRO requires submitting Key Performance Indicator (KPI) data to NCPRO via a quarterly, semi-annual, and/or annual survey. Please provide contact information for the person who will be available to provide accurate and up-to-date performance data on these surveys.

**Who will report to NCPRO on performance?**

**Title/position of performance measure contact**

**Email address of performance measure contact**

**Phone # of performance measure contact**

### SECTION 2: PROJECT TIMEFRAME

Project Timeframe  
Please select the appropriate quarter for each question in this section.

\*Note: You may select the same quarter for multiple questions if appropriate.

\*Note: per UST requirements, all SFRF project funds must be fully obligated by Dec. 31, 2024 and expended by Dec. 31, 2026.

**When do you expect to complete this project?**

**Estimate when 25% of SFRF \$ will be obligated**

### SECTION 6: KEY PERFORMANCE INDICATORS (KPI)

For this section, think about what KPIs you use to gauge project progress and/or success. See the KPI Guidance document for definitions and details on each KPI-related question.

This survey section provides placeholders for up to 10 KPIs. Please list the KPIs you are tracking. Typically, most projects track 3 to 7 KPIs.

**KPI 01 - Name of measure**

**KPI 01 - Type of Measure**

**KPI 01 - Brief description of measure**

**KPI 01 - Unit of measurement**

**KPI 01 - Measuring Strategy/Data Source**

**KPI 01 - Measure start date**

**KPI 01 - Measure end date**

**KPI 01 - Frequency of reporting to NCPRO**

**KPI 01 - Does KPI have equity component?**

**KPI 01 - How is this data disaggregated?**



## 4. Submit

After copying and pasting your responses from the template into the survey, you are ready to submit your responses by clicking the "Submit Update" button!

**Submit Update**

## 4. Submit

- If you accidentally submit the survey before completing it, or you want to alter a response after submitting, **contact your NCPRO grants manager** who will send a new survey link prepopulated with all info you've already submitted.

# Due Date Reminder & Upcoming KPI Intake Trainings

- Reminder: KPI Intake Surveys are due on Friday, May 26<sup>th</sup>
- There are 2 upcoming KPI Intake Survey Training Sessions
  - Tuesday, May 16<sup>th</sup> at 1pm
  - Monday, May 22<sup>nd</sup> at 2pm
- Reach out to your grant manager with any questions

Questions?