

SECTION IV PERFORMANCE CHECKUP (ASSESSMENT OF FIRST YEAR ACTION PLAN GOALS AND OBJECTIVES)

The City must use the CAPER to describe how well it succeeded in meeting the priorities and strategies included in the 2000-2003 Consolidated Plan and the previous year's Action Plan by analyzing how project activities met the goals established in these documents.

The *Performance Checkup* is based on HUD's Logic Model chart already in used for several HUD-funded programs. The Performance Checkup illustrates the effects of a project activity or program, expressed as short-term and long-term outcomes. The information provided in the Performance Checkup will replace several of the narrative questions pertaining to overall project and program evaluation responded to in previous years. For past CAPER reports, departments have had to provide lengthy narratives to evaluate their programs.

The Performance Checkup summarizes evaluations of funded programs, what was planned, how they were measure, what actually occurred or is expected to occur, both short-term and long-term; and why. This is an approach consistent not only with HUD's recent requirement for development of performance measurement and reporting system, but will also help departments evaluate the effectiveness of the programs and projects that they administer to better "fine tune" their implementation, and to make them more competitive in the future. The Performance Checkup flows naturally from the problem (need statement) to the service or activity - and to short and long-term outcomes – and on to goal setting and achievement; and lastly, to evaluation of the project. The goal is to make evaluation continuous.

The Performance Checkup details all projects approved through the regular Consolidated Plan process for 2003-2004; that is, through the annual municipal review and approval process by the mayor and city council; and projects created through reprogramming actions. These occurred because some projects were not progressing satisfactorily, and funds were moved to create new projects or be added to existing projects. Programs and projects created through the seventh reprogramming round are included.

City staff found that all project activities were consistent with the five-year goals and objectives set forth in the city's Consolidated Plan and HUD CDBG statutory and regulatory requirements; and that the City successfully met the HUD requirement of at least 70% of all CDBG funds spent on low- to moderate-income persons.

Definitions for the Performance Checkup Chart

- Program Area-Corresponds to eligible activity categories in the Action Plan.
- Component Name-Funding source or sources.
- Project Name-Name adopted by the City in adoption of the Action Plan.
- Problem/Need/Situation-What conditions gave rise to the project.
- Service or Activity-How the programs or projects address the problem.
- Short/Long Term Outcomes-Short-Term Outcomes: Immediate result of the output being met. Long-Term Outcomes: Identifies the broader impacts for individual, families/households, and/or the community.
- 2003-2004 Performance Goal-Project goal as identified by the department in the grant application.
- Measurement Reporting Tools-Those things used to measure benchmarks, and ultimately, outcomes. This can include inspections, reports, referrals, consulting sessions, business plans, facilities renovated, monitoring reports and any other units of measurement used the department

to monitor progress of Consolidated Plan-funded projects and programs.

- 2003-2004 Performance Goal-Report actual (numeric or other) accomplishments against goals stated in the Action Plan.
- Goal Variance-By how much and in what sense did (or didn't) the actual accomplishments meet the goals as stated in the Action Plan.
- Evaluation-The backbone of the Performance Checkup and mandatory for all Consolidated Plan-funded project activities and programs. It assesses the success in meeting the output goals and results, short- and long-term outcomes associated with the achievement of the purposes of the program, as well as the impact that the work has made on the individuals assisted, the community, and the strategic goals outlined in the Action Plan and by HUD. In addition, it identifies the methodology that the department will periodically use to assess its success in meeting its benchmark output goals and results in the future.

The Performance Checkup is located in the appendices section (appendix 1) at the end of the CAPER.