

Goals and Metrics Guide for Applicants

Guide Purpose

This guide helps organizations clearly define what success looks like for their grant-funded project or general operating work and how to measure progress and outcomes. Strong goals and metrics help organizations track whether their work is progressing, learn what improvements are needed, and communicate impact. Use of this guide is optional and is to support applicants with developing goals and metrics.

Adding Goals and Metrics to the Grant Application

The grant application must include goals that describe what you aim to accomplish with the requested funds within the grant period. The goals and metrics must be aligned to the Priority or Priorities listed on one or more focus area Theories of Change, the grant application (project/program, capital, or general operating), and proposed budget.

- Each application will include a minimum of two and a maximum of five goals.
- Two goals must be quantitative, and the others can be either quantitative or qualitative.

In the application, first copy and paste a priority from a Theory of Change, then write the goal and list the metric(s) as demonstrated by the example below. Note: This goal includes SMART (specific, measurable, achievable, relevant, and time-bound) objectives, trackable metrics with targets, and plans for collecting data.

Theory of Change: Access to Care - General

Priority: Provide outreach and education around healthy behavior

Goal: Within a 3-month period, 90% of people attending the diabetes self-management classes will participate in experiential learning that promotes best practices for diabetes self-management by exhibiting at least 4 of the following self-care behaviors: personal blood glucose check; track carbohydrates; identify carbohydrates, proteins, and fats; participate in exercise; practice a stress relieving activity. Activities will be tracked through participant logs collected on a weekly basis.

Defining Goals, Objectives, and Metrics

- Goal: A goal is a broad statement describing the desired change or outcome a project intends to achieve.
 - Quantitative goals are based on numerical data that can be measured or counted to describe activities or outcomes. Examples include the number of pounds of food distributed, A1c improvements, PHQ-9 improvements, number of services a client receives, number of devices distributed, and number of certifications gained by students.
 - Qualitative goals are based on non-numerical data that cannot be easily counted and can help explain why, how, or what of activities or outcomes. Examples include testimonies of improved quality of life due to intervention, or participants in digital literacy programs describing the impact of acquiring devices.
- Objectives: specific, measured steps that translate broad goals into clear, actionable, and trackable (SMART) actions that a program will take within a defined timeframe to achieve its goal(s).
- Metric: A metric (also called an indicator) is a specific, measurable value used to track progress toward a goal or objective.

Sample Metrics for Applicants

Sample Metrics that applicants can adopt, adapt, or use as guides when writing their own metrics are available in the Grant Resource Library. Applicants are NOT required to use sample metrics provided.

Steps to Write Your Goals and Metrics

Step 1. Write Your Goals

Describe the overall change you want to see as a result of the grant-funded work with broad statements of the change intended. They should be clear, outcome-focused, and connected to community impact. Identify whether they are quantitative or qualitative.

Example: Our project will improve / increase / reduce [xx] for [xx] in [xx].

Step 2. Define SMART Objectives for Each Goal

List the specific results you expect to achieve during the grant period. Objectives should be SMART (specific, measurable, achievable, relevant, and time-bound).

Step 3. Identify the Metric(s) for Each Goal

Metrics are specific measures used to track progress toward objectives.

Step 4. Set Targets for Each Metric

Use targets to define how much change you will achieve. Targets should be realistic and based on past performance, capacity, and community needs.

Step 5. Plan for Data Collection

What tools or processes will you use to collect data? When and how will you collect the data?

Step 6. Plan for Tracking and Reporting Your Data

How regularly will you monitor metrics during the grant period (weekly, monthly, quarterly, or annually)? Are there any reporting requirements to consider along the way?

Step 7. Unpack Your Data: Outputs and Outcomes

Distinguish between outputs and outcomes to capture both activity and impact.

- Outputs are the direct products of program activities. They measure what the program delivered or produced.
- Outcomes are the changes that occur for participants as a result of the program.

Example

Step 1. Write Your Goals

- a) Increase access to affordable internet for low-income households in zip codes 12345 and 5432 through public benefit enrollment (quantitative).
- b) Improve digital skills for low-income household members, in particular patients and students, in zip codes 12345 and 54321 through workshops (quantitative).

Step 2. Define SMART Objectives for Each Goal

- a) Enroll households in a reliable internet service by end of grant year
- b) Deliver digital skills workshops for community members between February and October
Train participants in basic digital literacy skills between February and October

Step 3. Identify the Metric(s) for Each Goal

- a) # of households enrolled in internet service
- b) # of workshops offered
of participants in digital skills
of participants with improved digital skills

Step 4. Set Targets for Each Metric

- a) Households connected - 200
- b) Workshops offered - 10
Participants completing training - 150
Participants improving skills - 75%

Step 5. Plan for Data Collection

- a) Daily program logs by digital connectors
- b) Workshops logs by digital navigators
Attendance logs for each workshop
Workshop pre- and post-assessments

Step 6. Plan for Tracking and Reporting Your Data

- a) Daily program logs, summarized at the end of the week
- b) Review workshops logs and attendance every week
Review pre- and post-workshop assessments every week

Step 7. Unpack Your Data: Outputs and Outcomes

Outputs (activities)

- a) 250 households enrolled in the affordable internet service program
- b) 10 workshops delivered
175 participants trained in basic digital literacy

Outcomes (impact)

- a) 80% of households report using internet access to schedule doctor appointments through online patient portals
95% of households with students report using the internet for school work
- b) 70% of participants reported increased digital skills

