

Quarterly Performance Scorecard User Guide

Accelerating Progress towards Performance Targets

As a federal grant recipient, you must meet your grant performance goals, which are the numerical targets you established for a set of performance outcome measures in the Nursing Expansion Funding Opportunity Announcement (FOA) for your training track.

Why It's Important

- **Minimum Objective:** Meeting performance targets demonstrates success and is the primary tool the Employment and Training Administration (ETA) uses to gauge your program's effectiveness.
- **Measurable Outcomes:** Your success reflects on your program's impact on your community, which can attract new partners, employers, and participants to your program.
- **Decision-Making:** Program adjustments can be made in response to the outcomes realized by your participants.
- **Accountability:** Performance goals are key for federal grant continuation.

Your quarterly performance scorecard provides a framework for assessing progress toward achieving your targets for the Track 1 performance outcome measures for your DOL Nursing Expansion grant.

The Scorecard

Scorecards are updated each quarter and provide you with a snapshot of several pieces of information including grant time elapsed, grant target and number achieved for each outcome measure, percent of target achieved, and the percentage of your participants achieving outcomes at some of the stages in the [Participant Support Lifecycle Tool \(PSL Tool\)](#)¹. You'll use the information in the scorecard to gauge where you are in your grant timeline and how close you are to reaching your performance goals.

Track 1 Grantee Quarterly Performance Scorecard

This scorecard provides a snapshot of your overall performance for your Department of Labor (DOL) Nursing Expansion grant. This is the certified participant data you submitted through WIPS for the identified quarter. If the information in your records differs from the data shown on this scorecard, please send an email to NursingExpansion@dol.gov and copy your FPO to troubleshoot the discrepancies.

Grantee: [Grantee Name]

Quarter Ending: [xx/xx/xxxx]

Percent of Grant Elapsed: 65%

Performance Outcome Measure	Actual [6.30.24]	Total Target	Number Remaining to Target	Percentage of Total Target Achieved	Percentage Achieving Outcomes at Participant Lifecycle Stages
Participants served	137	224	87	61%	N/A
Participants enrolled in education/training activities	137	224	87	61%	Percent of those served who enrolled: 100%
Participants who achieved a Measurable Skills Gain (MSG)	150	222	72	68%	Percent of enrollees who achieved a MSG: 88%
Participants who completed education/training activities	68	215	147	32%	Percent of enrollees who completed training: 50%
Participants who completed education/training activities AND received a credential	65	215	150	30%	Percent of completers who received credential: 96%
Participants who completed education/training activities and either entered employment or advanced into a new position	53	200	147	27%	Percent of completers who entered employment or advanced to a new position: 82%

Refer to the crosswalk provided in the Scorecard Tool to link the performance outcome measures with the Quarterly Performance Reports (QPR) generated in WIPS and the specific data elements in the Participant Individual Record Layout (PIRL).

¹ The PSL Tool is designed to help identify critical moments where participants disengage, as well as opportunities for support along the way.

Using the Quarterly Performance Scorecard to Evaluate Your Program

These steps can help you analyze whether your program is achieving the intended results and how to course correct when needed.

- **Step 1 – Understand and Validate Your Data**
- **Step 2 – Identify Gaps in Meeting Goals**
- **Step 3 – Break Grant Targets into Quarterly Targets**
- **Step 4 – Develop an Action Plan to Achieve Results**
- **Step 5 – Discuss Grant Amendments with Your Federal Project Officer (FPO), as Needed**
- **Step 6 – Establish Ongoing Reviews for Continuous Improvement**

Step 1: Understand and Validate Your Data

Begin by reviewing the quarterly scorecard provided to you by the Technical Assistance (TA) team. Ensure that the numbers on the scorecard match your own tracking numbers and that there are no discrepancies between your “official” performance numbers in the Workforce Integrated Performance System (WIPS) and any internal tracking methods.

The performance data that is included in the scorecard comes from multiple sources. Table 1 provides a crosswalk that links the outcome measures as shown on the scorecard with those sources, which include:

- the official performance outcome measure names in the FOA, which are used to populate your scorecard’s target column
- the line items on the Quarterly Performance Report (QPR) associated with each outcome measure, which are used to populate the number achieved to date on the scorecard
- the data elements in the Participant Individual Record Layout (PIRL) used by WIPS to calculate the numbers appearing in the QPR for each outcome measure, which are included for your convenience.

If you identify a number on your scorecard or QPR that is different than what you expect, review the corresponding data elements in the PIRL to ensure you are capturing participant data accurately. Below is an example of how the crosswalk can help you validate your data.

Example: Use the Crosswalk to Validate Your Data

1. While reviewing your scorecard, you notice the number listed for *“Participants who completed education/training activities AND received a credential”* is lower than you expected. Your internal records show 45 participants have received credentials, but the scorecard reports 30.
2. Based on the information provided in the crosswalk, you check your latest QPR outcome F2. and see it also reports 30 participants who completed training and received a credential.
3. By referring to the crosswalk, you know the PIRL data elements used for this outcome measure are 1800, 1802, 1804, and 1813. When you review your latest PIRL data file, you realize these numbers were not updated between quarters.

4. Through this validation process, you discover the new staff member assigned to quarterly reporting did not know these data elements need to be updated each quarter and, although they were tracking when training started and ended, they were not updating the data elements to reflect credentials earned.
5. You can now provide additional training for your staff and ensure the number is correct in your next quarterly report.

Table 1. Crosswalk of Performance Outcome Measures for Track 1

Official Performance Outcome Measure ²	Scorecard Performance Outcome Measure	QPR Outcomes Used for Reviewing Target Progress	Data Elements Required for QPR Outcomes
1. Total number of participants served	Participants served	A2. Total Participants Served	PIRL 900 Date of Program Entry
2. Total number of participants who began receiving education/job training activities	Participants who started education/training activities	E5a. Started Education/Job Training Program Activities	PIRL 1302 Date Entered Training #1
3. Total number of participants who began receiving education/job training activities and achieved a measurable skills gain	Participants who achieved a Measurable Skills Gain (MSG)	N/A This outcome does not appear on the QPR and progress toward the target can be viewed in the PIRL and is provided to grantees by DOL in your Quarterly Performance Scorecard.	PIRL 1809 Date of Most Recent Measurable Skills Gain (Training Milestones) or PIRL 1810 Date of Most Recent Measurable Skills Gain (Skills Progression)

² These official performance outcome measure names are shown as listed from the Nursing Expansion Funding Opportunity Announcement.

Official Performance Outcome Measure ²	Scorecard Performance Outcome Measure	QPR Outcomes Used for Reviewing Target Progress	Data Elements Required for QPR Outcomes
4. Total number of participants who completed education/job training program activities	Participants who completed education/training activities	F1. Completed Education/Job Training Program	PIRL 1307 Training Completed #1 and (if applicable) PIRL 1312 and/or 1317 (Training Completed #2, #3) PIRL 1813 Date Completed, During Program Participation, an Education or Training Program Leading to a Recognized Postsecondary Credential or Employment
5. Total number of participants who completed education/job training program activities and obtained a credential	Participants who completed education/training activities AND received a credential	F2. Completed Education/Job Training Program and Received a Credential	PIRL 1800 Type of Recognized Credential #1, PIRL 1802 Type of Recognized Credential #2, and/or PIRL 1804 Type of Recognized Credential #3, (at least one of PIRL 1800/1802/1804 must have a code value other than 0) PIRL 1813 Date Completed, During Program Participation, an Education or Training Program Leading to a Recognized Postsecondary Credential or Employment

Official Performance Outcome Measure ²	Scorecard Performance Outcome Measure	QPR Outcomes Used for Reviewing Target Progress	Data Elements Required for QPR Outcomes
6. Total number of participants who completed education/job training program activities and either entered unsubsidized employment or advanced into a new position	Participants who completed education/training activities and either entered employment or advanced into a new position	G2. Unemployed Participants Who Completed an Education/Job Training Program and Entered Unsubsidized Employment and G3. Employed Participants Who Advanced into a New Positions After Completing an Education/Job Training Program	PIRL 400 Employment Status at Entry = 0 PIRL 1307 Training Completed #1 and (if applicable) PIRL 1312 and/or 1317 (Training Completed #2, #3) PIRL 1813 Date Completed, During Program Participation, an Education or Training Program PIRL 2118 Date Entered Employment and and PIRL 400 Employment Status at Entry = 1 PIRL 1307 Training Completed #1 and (if applicable) PIRL 1312 and/or 1317 (Training Completed #2, #3) PIRL 1813 Date Completed, During Program Participation, an Education or Training Program PIRL 2120 Advanced into a New Position with Current or New Employer After Program Completion

Step 2: Identify Gaps in Meeting Goals

Once you have verified the numbers are accurate, review the scorecard to identify any gaps in performance. The “Percentage of Total Target Achieved” column will give you the clearest picture of where you stand in relation to your goals.

For example, if an outcome measure shows 55 percent of total target achieved and 50 percent of the grant has elapsed, you know you are currently on track to reach your target or if you are halfway through the grant, but you’ve only entered 10 percent of your participants in training, you might be behind schedule.

Table 2: SAMPLE Performance Measure (Completed Training) Percent of Grant Elapsed: 62%

Performance Outcome Measure	Actual 6.30.26	Total Target	Number Remaining to Target	Percentage of Total Target Achieved	Percentage Achieving Outcomes at Participant Lifecycle Stages
Participants who started education/training activities	100	250	150	40%	Percent of those served who started training: 35%
Participants who completed education/training activities	50	150	100	33%	Percent of those in training that completed: 50%

Percentage of Total Target Achieved

Although achievement of some outcome measures might occur for many participants further into the life of the grant, it may be important to pay careful attention to any “Percentage of Total Target Achieved” numbers that are behind the “Percent of Grant Elapsed” number (available at the top of the table), and make sure that gaps are reasonable when considering program factors like the length of your training program, previous program growth, or other contributing factors you or your partners may know.

Differences between the time elapsed and progress towards goals do not necessarily signify an issue but are a tool to stay in touch with performance outcome measures and initiate team discussions. Table 2 provides an example where 62 percent of the grant has elapsed and the “Participants who completed education/training activities” column shows 33 percent of the total target achieved. The difference between these two numbers deserves further attention and planning. In this example, you may raise the concern during your next program meeting and learn that a large cohort is scheduled to complete their training during the next month and that percentage will then align with the time elapsed.

Percentage Achieving Outcomes at the Participant Support Lifecycle Stages

The final column, “Percentage Achieving Outcomes at Participant Lifecycle Stages” helps you align the performance outcomes with the PSL Tool and can be helpful in identifying loss points or critical moments in the grant lifecycle where participants disengage.

In the example provided in Table 2, you can identify that only 50 percent of the 100 training enrollees completed the program, and this may be a loss point for your team to address. Why might participants be struggling to complete the training? This might be an opportunity for your team to identify barriers and potential solutions, as described in the [PSL Tool](#).

Step 3: Break Grant Targets into Quarterly Targets

Create quarterly targets by breaking your grant goals down further, quarter-by-quarter. This will help you avoid putting a plan in place with the hope that it will help you achieve your performance goals by the end of the grant performance period, only to have it fall short with little time left to pivot in a new direction. Developing short-term targets and can allow you to make course corrections as frequently as necessary throughout the life of your grant.

Methods of Developing Quarterly Targets

1. Breaking Targets Equally into Each Remaining Quarter

You can create quarterly targets quickly and easily by determining the actual number of participants left in each category and dividing that by the number of quarters left in the grant period. Using the example from Table 2, if “Participants who completed education/training activities” is a gap area, you would determine how many more participants need to complete training for you to reach your goal. If it is July of the third year of the grant, your target is 150 participants, and you have served 50, your analysis will look like this:

Table 3: SAMPLE Calculation – completed training/education required to meet performance goal

Number of participants still needed to complete education/training activities	Number of quarters left in grant period	Number of participants needed to complete education/training activities per quarter
150 (goal) minus 50 (completed) = 100 (still to complete)	8	13 (100 ÷ 8, rounded up to ensure goal met)

Keeping your planning simple may help your team set reasonable quarterly goals. However, this method does not consider the timing of program participation.

2. Aligning Quarterly Targets with Training Cycles

Another way to develop quarterly targets is to consider the start and end date of each training cycle during the grant period of performance. Align your quarterly targets with your expectations about when you expect to see target numbers shift. This method can be more time-consuming but allows you to take program nuances and grant requirements into account.

As a reminder, DOL Nursing Expansion grantees may not enroll any new participants after the end of the fourth year of the period of performance to allow the final 12 months to be spent ensuring participants complete their training programs. In this case, you need to meet your enrollment goal by the end of the 16th quarter of the grant. If one of your gap areas includes participants enrolled in training, you will consider the end of the fourth year as the deadline to reach your “Participants enrolled in education/training activities” target.

Step 4: Develop an Action Plan to Achieve Results

With your grant program team, use the information you have gathered so far to review your gap areas and your quarterly targets to better understand your specific challenges and opportunities:

- Refer to the [PSL Tool](#) to guide this discussion. Identify which stages of the participant lifecycle correspond to your performance gap areas.
- Consider using the action planning tool provided in the PSL Tool to make program changes that will impact your performance targets, keeping in mind the quarter-by-quarter goals you have set.

The performance outcomes generally correspond to the Participant Support Lifecycle phases as shown in Table 4. Step 2 of the PSL Tool guides you through using data to identify loss points and developing potential supports and strategies to address challenges.

Table 4: Performance Outcomes Aligned with Participant Support Lifecycle Phases

Performance Outcomes	Participant Support Lifecycle Phases
Participants served	 Intake, Onramps, and Enrollment
Participants who started education/training activities	 Training/Education Progress
Participants who achieved a Measurable Skills Gain (MSG)	 Training/Education Progress
Participants who completed education/training activities	 Completion & Certification
Participants who completed education/training activities AND received a credential	 Completion & Certification
Participants who completed education/training activities and entered employment or advanced into a new position	 Placement

Use the PSL Tool in conjunction with the scorecard information to increase participant success and remain on track to accomplish your performance outcomes.

As you consider your performance gap areas and the actions you will take to improve those areas, consider elements of your grant program that are going well. Consider why they are succeeding and how you can replicate those outcomes in other areas of your grant.

Step 5: Discuss Grant Amendments with your FPO, as Needed

When you complete the action planning activity, you may identify necessary adjustments that require a Grant Amendment Request. Examples of this might include adding a training program to your grant, realigning your budget to better prioritize your goals, or requesting a no-cost program extension. *Changing your performance targets is not an allowable amendment.*

To make an amendment request, contact your FPO to discuss your plan and talk through the process. Details on making the request can be found in Section 4 of the [ETA Grantee Handbook](#).

Step 6: Establish Ongoing Reviews for Continuous Improvement

This scorecard framework is designed to assist you in identifying areas where you may be falling short and plan for necessary adjustments to help you ultimately achieve those goals.

Setting quarterly targets and creating action plans are important steps in reaching your performance targets; however, it is crucial that you monitor progress on an ongoing basis and instill ownership of meeting these targets in your team and across your partners.

Ideally, you and your team will set up a regular time to meet—preferably monthly but at least quarterly—to assess your progress. If your grant program is well underway, and you are on track to meet performance outcome targets, with no discernable gap areas, quarterly meetings may be sufficient to keep your grant on track. However, if you have gap areas that you are working to close, your team should meet at least monthly to monitor your progress, discuss your action plan, and adjust plans where gap areas continue to persist. If you have subcontractors for your grant or partners that have a significant role in meeting your performance targets, it is essential that they are included in ongoing meetings and progress monitoring.

This regular accountability is key to ensuring that you not only have a good plan for success in place, but that everyone is following through, and you can make necessary adjustments for success. In addition, capturing lessons learned throughout your grant period can contribute to increasing efficiency and accelerating progress in future grants, as well as fill in knowledge gaps created because of staff turnover in your organization and grant team.