



## INTRODUCTION TO MICROSOFT® EXCEL-BASED TOOL FOR SETTING TARGETS FOR PROGRAM SUCCESS

To help resident services managers set bold but doable targets for program success, Enterprise has developed a Microsoft Excel-based tool to help in planning and setting targets. By entering relevant information about each program into the spreadsheet, a resident services coordinator can see which programs have the most potential participants. You can look at baseline information or review similar programs' experience to determine which programs will likely have the most participation and the most positive outcomes.

This tool is also designed to provide a framework for reporting program outcomes to affordable housing stakeholders. Tools designed to track outcomes and the effectiveness of programs are included in other sections of this manual. Below is a sample of the tool with definitions for the various data fields.

The following are definitions for the data fields:

- Number of Potential Participants: Based on surveys and discussions with residents, this is the total number of residents that could participate in the program.
- Target Number of Participants: Based on the previous column and the capacity of the program, this is the ideal number of participants for the program.
- Target Number of Those Achieving Outcomes: This is the number that you expect to achieve, the pre-defined level of success in the program.
- Define Successful Outcome: This is a description of what qualifies as success in this program. See examples in the chart below.
- Number of Participants Completing Program: Actual number of those completing the program.
- Number of Participants Achieving Success: Actual number of those achieving the successful outcome.
- Percent of Target Achieved: Calculation of the number who achieved the outcome divided by the target number for achieving outcome.
- Verification Method: What is used to verify the successful outcomes? Examples are test scores, report cards, improved credit scores, etc.
- Period of Performance: What is the period of performance, a month, six months, school year, full year? This depends on the program and its participants.

Program Name	Number of Potential Participants	Target Number of Participants	Target Number of Those Achieving Outcomes	Define Successful Outcome	Number of Participants Completing Program	Number of Participants Achieving Success	Percent of Target Achieved	Verification Method	Period of Performance
ESL	85	25	20	Mastery of ESL level	22	18	90%	Test scores	September - December
After-School Tutoring	39	20	15	Improved grades	18	18	120%	Report cards	September - January
Financial Literacy	85	30	20	Improved credit scores	20	10	50%	Credit scores from website	September - March

This Excel-based tool is available for downloading and customizing through the online version of this manual, which can be found at [www.enterprisecommunity.org/resources](http://www.enterprisecommunity.org/resources).

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