# Instruction Manual

## for the

# Benchmark Management System

March 2008
Version 5

USDA Rural Development

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# Benchmark Quick Reference Guide

## Using the Benchmark Management System

- **Do I need any specific software to use the Benchmark Management System?** No, the information is stored in a secured database and you can access it through the internet. You can access your community's benchmarks with any computer that has a connection to the internet. If your computer is older and slower it may take more time to navigate through the Benchmark Management System, but it will still work. (Page 3)

- **Are there Help Screens in the Benchmark Management System?** Yes, when you are on the Main screen entering a benchmark, move your cursor to one of the underlined words on the left such as "Goal" or "Target" and click on it with the left button of your mouse. A help screen window will pop up explaining the type of information requested for this field. (Page 6)

- **What time frame should we have in mind when writing benchmarks?** The benchmarks are a living document for your community, to see where it has been and where it intends to go. Generally your benchmarks should encompass the projects from your strategic plan for the next two years. Some benchmarks will be projects that progress over the full ten years of the designation in which case the progress will be documented in the Benchmark Management System. (Pages 6-10)

- **Can I log on to the Benchmark Management System website and stay logged on all day?** No, if you are not actively using the system it will automatically kick you out after 15 minutes and you will have to log in again. All of the changes you made will be saved in the system up until you were kicked out. As long as you are entering or updating information in your benchmarks you will not be kicked out of the system.

- **If someone else in the community wants to view our benchmarks can we give them our password and user name?** No, if someone has your password they can access your benchmarks in the system and <u>change or delete your benchmarks</u>. For security reasons only you should have access to your password. If someone wants to view the benchmarks, the community can print out a "Detailed Report" for them. (Pages 3-4)

- **If I update some information in one of my benchmarks and the changes I made do not immediately appear on my screen what should I do?** Click on the right button on your mouse and the word "Refresh" (Microsoft Explorer) or "Reload" (Netscape) will be one of the options that appears. If you select Refresh or Reload and click on it with the left button on your mouse the Benchmark Management System will pull the most current information from the database and present it on your screen.

- **Is there a way to prepare information using a word processing program and then cut and paste it into the Benchmark Management System.** Yes, you can cut and paste information by clicking your right mouse button and using the "copy" option to copy the text you want to place in the Benchmark Management System and then log in to the Benchmark Mangement System and click on the right button on your mouse and selecting the "paste" option. For other methods and shortcuts, refer to your word processing software manual.

- **Can we create reports from the benchmarks of other communities?** Yes, you can create detailed reports or general overview reports by selecting the different fields on the "Create New Report " link. These can be reports on your own community's benchmarks or other EZ/EC, Champion or REAP communities. (Pages 21-27)

- **Who is the person I call if I have a question about using the Benchmark Management System?** Your Desk Officer is your point of reference and they have been trained to provide technical assistance on using the system.

- **What are the two annual reports required of each Community?**
  The Online Annual Narrative Report is due each January and the Online Annual Benchmark Report is due each August. The Annual Narrative Report asks the community to respond to eight questions pertaining to overall accomplishments, partnerships formed, obstacles, solutions and best practices over the previous year. The Rural Development State Office will review this report and then it will be reviewed by the National Office. The Annual Benchmark Report is a Detailed Report from the Benchmark Management System to review the progress and documentation of each community's benchmarks. Those communities that keep the information in their online benchmarks current each month will already have a complete report. (Pages 5, 17, 21-27)

## Updating Benchmarks in the System

- **Who should be responsible for updating the information in the Benchmark Management System?** Each community needs to identify one person who will be responsible for updating the information in the system each month. It is best to have one person responsible for actually entering the data, if there is more than one, the responsibility for updating the information becomes clouded and the entries become less systematic. <u>However, it is the responsibility of board members to ensure that the person responsible for updating the benchmark information is provided with the data they need</u>. One person cannot be expected to track down all the information and also enter it into the system. (Page 17)

- **How often should we be updating the information about our community in the Benchmark Management System?** Financial figures and project status such as output to date, completion of tasks should be updated monthly. The on-line benchmarks should be thought of as a living document that is distributed at each board meeting and on a regular basis to the community to let them know what progress has been made since the designation. <u>The Benchmark reports can serve as a valuable public relations tool if you keep the information contained in the benchmarks current</u>. (Page 17, 22)

- **Can I create a report of the total funding that has been received by my community?** Yes, if you select "Create a New Report" and then select "Partners and Resources", the Benchmark Management System will create a report of the total "Funds Requested" and "Funds Received" broken down into several categories including Federal Agencies, State Government, Local and Regional government, Private Sector, and Non Profit. (Pages 21, 25-26)

- **Can a Community Delete a Benchmark?** No. The benchmarks are a running list of what the community has worked on and will work on in the future. As stated before it is a living document, if the community votes to not implement one of its benchmarks, it can mark it as "Inactive" and in the Notes section list the reason why the benchmark will no longer be pursued. (Page 7)

- **How many Benchmarks should we have? And how many tasks under each Benchmark?** The number of benchmarks can vary between communities depending on their preference. Some communities choose to create benchmarks goals that are very specific such as "Purchase new playground equipment for the Hatterfield Elementary School and Birchwood Park to make them safer." Others choose to have Benchmarks that cover a wider scope of activity "Improve the level of community safety by upgrading the crime prevention capabilites of the EC area." The tasks listed will then identify specific projects under this benchmark such as establishing a community watch program, purchasing two new police cars, creating a 911 emergency response system, etc. The key to properly creating benchmarks is not in having the right amount, but rather ensuring that they properly cover the scope of activities taking place within the designated area. <u>Every community should be creating benchmarks that are focused, feasible and measurable</u>. See the training benchmarks in Appendix C.
  (Pages 6-12)

## Documenting Funding

- **If my community wants to enter funds we received from our designation (Round I, II or III) for a project we are working on, how should it be entered in the funding section of the Benchmark Management System?** Page 13 of this manual explains this in detail. Note the difference for which agency should be listed as the funder: if you are a Round I community the Agency *Department of Heath and Human Services,* if you are a Round II or III community it is *USDA Rural Development*. (Pages 13-15)

- **Should we make entries for funding we are considering applying for or only for those funds we have actually applied for?** List only those funds in which <u>an actual request</u> for funds has been made; do not enter potential funding sources. Set up a process within your community such as the day the application is submitted, you enter the data into the Benchmark Management System. (Pages 14)

- **After we have received funding we applied for, how should we update our funding section in the benchmark?** Enter the amount you received under the "Funds Received" column and leave the original amount applied for under the "Funds Requested column. If you received less than you requested <u>do not change the amount requested to match the amount received</u>. <u>Also, do not enter a zero in the amount requested after you enter the amount of funds received.</u> (Pages 14-15)

- **If we receive both a grant and a loan for a project under one of our benchmarks, for example a $10,000 Community Facilities loan and a $5,000 Community Facilities grant from USDA Rural Development for the purchase of a police car do we have to enter each of these separately?** Yes, the loan and grant need to be entered on separate lines and under the field labeled "program" you need to list what the funds are for. Example, "Community Facilitiles grant for the purchase of a police car in town of Bloomington." See the training benchmark on housing in the Appendix B for more examples. (Pages 13-15)

- **Should I enter a zero in the "Funds Requested" column when I receive requested funds?**
  No. When applying for funding enter the amount of funding that has been applied for under the "<u>funds requested</u>" column and a zero in the "<u>funds received"</u> column until funding is received. Then if the funds are granted, change the zero in the funds received column to the amount of funding that has been awarded. If the amount awarded is less than the amount requested **do not** change the amount requested to the amount awarded. Those reviewing the benchmarks will assume the community will seek other funds to cover the difference. <u>Do not enter a zero in the funds requested column once funds have been received despite what earlier versions of the training manual may have implied.</u> (Pages 13-15)

## Units of Measurement/Secondary Outputs

- **Why is it important to add secondary outputs?** When communities create a benchmark they choose a primary unit of measurement that monitors the progress on a project. A community's benchmark might be to establish a youth center for at risk youth and the primary unit of measurement selected might be "# of youth centers". While this indicator will tell us when the youth center has been created it will not tell us how many children are using the center or how many jobs the youth center created in the community. By adding secondary outputs such as "# of youth participating" and "# of jobs created" we are better able to grasp the aggregate benefits to the community from the implementation of this benchmark. <u>A community can add as many secondary outputs as it wishes</u>. (Pages 8, 15)

- **If there is a unit of measurement that I want to use in my community, but it does not exist in the Benchmark Management System can it be created?** Yes, email your Desk Officer with your request and one will be created for you. (Page 9)

- **Can I print out a list of all the units of measurement in the Benchmark Management System to keep as a reference when writing benchmarks?** Yes, if you login to the Benchmark Management System you will see the Application Function Menu. Select the link that says "show all measures" and the system will create a complete list of all the measures, you can print this out and use it as a reference. (Page 32)

## Baselines and Output Date

- **Should the output to date always be zero?** Not necessarily. The baseline is the starting points for the benchmark and it will often be zero. If the baseline is a number other than zero, this means that you have documented a starting point in a benchmark that had a pre-exiting output level, e.g. "# of homes constructed, "miles of sewer lines." The reason for choosing this number needs to be explained in the Notes section of the benchmark. If you enter "2" as the baseline and do not enter what this number means in the Notes section it will be hard for those reviewing the benchmarks who may not be familiar with the specifics of this project to know what this starting point means. (Pages 8-10)

- **Does the Output to Date measure the amount of progress made on a yearly basis or since the start of the program?** The Output to Date along with the information in the funding section and secondary outputs will measure the progress from the start of the benchmark. If you want to keep yearly updates of your progress you can print and save a report each year and use it to measure the progress from year to year. We recommend this as a "Best Practice." See the section on saving reports with specific data for later use. (Pages 17, 29)

## Inactive and Active Benchmarks

- **When should a benchmark be considered Inactive?** Active benchmarks are all the benchmarks that a community is currently implementing or will implement in the near future (next two years). A community should make a benchmark "inactive" if it is a benchmark that they will no longer pursue, the community should mention in the Notes section the reasons why they no longer intend to implement this benchmark. Inactive benchmarks are not just on "the back burner," they are projects that will not be undertaken. The community should not mark benchmarks inactive that they feel they have "completed" because often these benchmarks will continue to generate benefits that the community should be documenting. When a community creates a report in the Benchmark Management System they have the option of excluding or including the "Inactive" benchmarks. (Pages 6, 18, 20)

## Table of Contents

# Preface

The benchmark process started out as paper reports that were sent between the communities, the Rural Development State Offices and the National Office[1].

This process was time consuming and difficult for all parties involved; it also did not allow communities to create reports to serve their own needs. Through suggestions from communities and Rural Development staff, National Office staff set out to recreate the process of monitoring benchmarks. An information system was needed that could be flexible enough to accommodate community individuality, yet standardized enough for national reporting. This led to the creation of the Benchmark Management System (BMS) in 1998, and later updated in 2008 to mimic the new look and feel of USDA's websites and to update the programming language. The BMS was designed to fulfill the following objectives:

- To create a management tool for communities and USDA.
- To identify best practices and success stories for wider application and peer learning.
- To spot problems early and target technical assistance.
- To streamline the flow of information.
- To demonstrate accountability to Congress, the White House and the public.
- To promote the many accomplishments of rural communities.

If you have a question about using the Benchmark Management System, please call your Desk Officer. Your Desk Officer is your point of reference for the Benchmark Management System. They have been trained to provide technical assistance on using the system.

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[1] The Benchmark Management System was created by the Office of Community Development, which became defunct in 2006.

# Accessing the System

To use the Benchmark Management System, you must have three things:

1. For community users - a USDA eAuthentication Level 1 ID. This can be obtained easily by going to this website. http://www.eauth.egov.usda.gov/index.html or for USDA RD State staff, contact your Desk Officer.
2. You are registered to use the Benchmark Management System by your Desk Officer. See Types of Users and Registering Users below to learn how.
3. A Computer with Internet access.

## Internet Access

***You access the Benchmark Management System at the URL address https://bms.sc.egov.usda.gov.***

For proper viewing, you must have a current version of Internet Explorer or Netscape Navigator. These web browsers are available free on the Internet.

The Benchmark Management System is not a software package that you can buy and install on your computer. All information is stored in a database at USDA. When you access the system, you will use a Website to enter information. You can access information as long as you are an authorized user and have internet access.

## Types of Users

There are three types of users: communities, (RD) State Offices, and National Office. All users have access to the same information, but are permitted different activities. Community users can add new benchmarks, update existing benchmarks, view other communities' benchmarks and create reports. State Office users can review benchmarks, view other communities and create reports. As the system Administrator, the National Office can register new users, create new categories, activities and measures, and maintain the database.

**Registering Users**

Community Users - once you have your eAuthentication (eAuth) Level 1 ID, please Login to the Benchmark Management System and fill out the requested information. Once submitted, a Desk Officer will receive notification of the request and will confirm your Benchmark Management System registration and send an email notifying you that you can now use the Benchmark Management System. This can take an hour or a day or two.

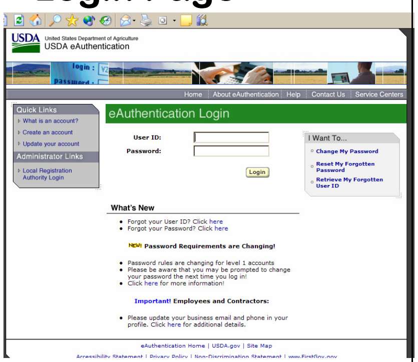
USDA Rural Development State Offices - Sending an email to your Desk Officer will initiate the process for your Benchmark Management System Registration. You will be notified when you are registered, this may take one to two days. Note: You will use your eAuth Level 2 ID to use the Benchmark Management System.

National Office Staff - please send an email to the Benchmark Management System role-based administrator in St. Louis to notify them of changes in State and National Office Staff.

**Security**

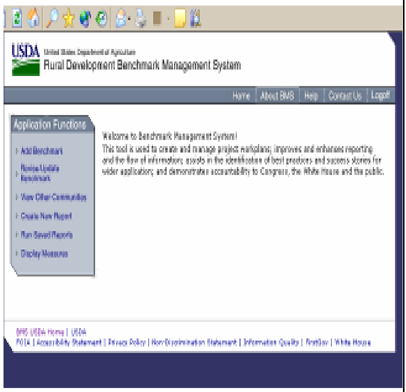
Each community can change its own data, but not that of any other community.

## Login Page




***Type in your eAuth User ID and password in the boxes provided. Use the Tab key or the mouse to move to the next box. Then click on the "Login" button. If you typed an incorrect User ID or password, your login will fail and you will need to re-enter the information.***

## Application Functions Menu




***You are now logged into the Benchmark Management System. If no activity takes place for 15 minutes, you will be logged off automatically and have to Login again.***

You should now see an Application Functions Menu on the left hand-side. The activities you see listed will depend on whether you are logged on as a community, State, or National Office user. As you move to other pages in the Benchmark Management System, the Application Functions menu will continue to be displayed in the left column of your screen.

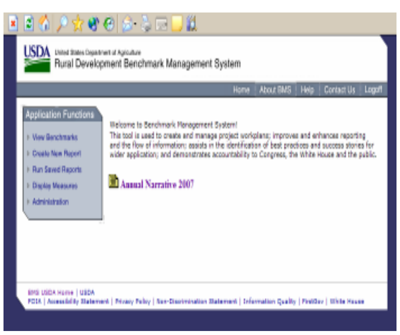
The full list of activities is as follows:

- Add Benchmarks (community)
- Revise/Update Benchmarks (community)
- Review Benchmarks (state)
- View Other Communities (community and state)
- Create New Report (all)
- Run Saved Reports (all)
- Display All Measures (all)
- Administration (National Office)

***Click on the function you wish to do. If for some reason you do not see anything, click on the Reload or Refresh button on your web browser or F5.***

When it is time to complete your Annual Narrative Report, you will see an additional activity listed under the Welcome paragraph and it will say: "Input Annual Narrative Report"

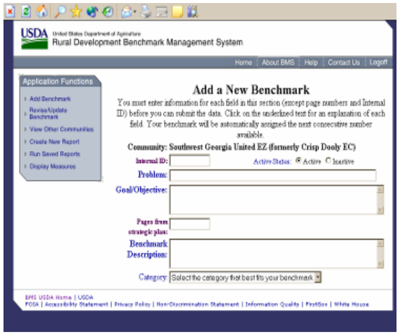
## Menu Bar




At the top is a Menu Bar, which is available on every page, with the following items:

**Home** - takes you to this page at right and Welcomes you to the Benchmark Management System. And will include a link to the Annual Narrative Report when it is due.
**About BMS** - Describes the purpose and functions of the system.
**Help** - Here you can access this manual and email us for help.
**Contact** - Email questions, concerns or suggestions.
**Logoff** - this is where you log out of the system.

# Add a New Benchmark




Use this function when you want to add a new benchmark. [Note: State and National Office users will not be able to access this activity.] Benchmarks will automatically be assigned the next whole number available. For example, if you have 15 benchmarks in the system, the next benchmark will receive number 16. This number will not appear until you have submitted all the required information about your benchmark. You cannot change this number. If you make a mistake and want to "reuse" a number, you must use the revise/update section to make changes. <u>You cannot delete benchmarks.</u>

***The first screen you will see contains entry boxes for the required information about your benchmark. You must enter information in all of the text boxes in this section, except page numbers and Internal ID, in order to submit your benchmark data.***

***Help Screens***

If you do not know what information is asked for, click on the underlined text for an explanation of each field. Use the Tab key to move from box to box.

<u>If you take longer than 15 minutes to enter the information for a new benchmark you will be bounced out of the system, have your data prepared ahead of time so it can be entered quickly.</u>

### Internal ID

New benchmarks will be assigned numbers automatically through the Benchmark Management System. This is the official numbering system recognized by USDA. You cannot change the Benchmark Numbers. If your community wishes to use a different numbering system for internal use, you can assign each benchmark an Internal ID. You can only enter numbers, not letters in this field. <u>You may use numbers with a single decimal</u> (i.e. 1.1, 1.2, 1.3).

***Enter an Internal ID number for this benchmark if you do not want to use USDA's official numbering system. [Optional]***

### Active and Inactive status

Active benchmarks are all the benchmarks that a community is currently implementing or will implement in the near future (next two years). An "Inactive" benchmark is one the community will not be undertaking. The community should mention in the Notes section the reasons why they no longer intend to implement this benchmark. Inactive benchmarks are not just on "the back burner," but are projects the community has voted not to continue.

Inactive benchmarks can be "hidden" from display in the

Revise/Update Benchmark screen and excluded from reports.

Only a community user has the ability to designate a benchmark as active or inactive, but all users can display all benchmarks in the reports.

Benchmarks that are completed should not be made "inactive" because in most cases the projects under the benchmark will continue to generate benefits that the community should be documenting. And this information is used by the National Office for reporting purposes.

**Problem/Opportunity**

The Strategic Plan identifies and prioritizes issues in a community. Typical categories include housing, health care, education, infrastructure, economic opportunity, environment, crime, and social services.

***Enter the Problem or Opportunity that was identified in your Strategic Plan.***

**Goal/Objective**

The "Goal" states what your community wants to achieve with respect to a particular problem or opportunity. Select the goals from your Strategic Plan that you want to focus on for the next two years and enter them into the Benchmark Management System. The information in your benchmarks should be updated monthly, and always keep in mind that your benchmarks should be a two-year projection of the activities your community hopes to achieve. It is important that benchmarks be written with a clear and measurable goal in mind.

**Pages from Strategic Plan**

Please enter the page number from your Strategic Plan that relates to this Goal/Objective. This will speed up USDA State Office review of your benchmark. This is an optional field, but it is recommended that you provide the information.

***Enter the page numbers from your Strategic Plan that refers to this Goal/Objective. [Optional]***

**Benchmark Description**

Describe what you are going to do to achieve your goal. Select measurable strategies, because you will also choose performance indicators for them. Benchmarks will usually involve a number of smaller projects and tasks, such as applying for funding or preparing a plan. If you create an extremely large number of benchmarks, you may have difficulty tracking them. If you create very few benchmarks, they may not reflect the whole range of problems and issues that you are addressing.
Enter a description of your benchmark.

**Sample Benchmark Description**

***Make the description focused and measurable,***
*"Construct forty new single family homes in the EC area over the next two years."*

*"Create three new after school computer training programs and provide training to 200 students over the next two years."*

*"Establish a business incubator and generate three new businesses per year over the ten years of the designation"*

**Category**

Ten major categories of community activities are listed in the drop down box. They are used by USDA to group similar community benchmarks for national reporting purposes. You will have the ability to link your benchmark to additional categories when you update your benchmark.

The Category field is linked to the Activity and Unit of Measurement fields in the Benchmark Management System. This allows you to sort information and create reports later. You must select a Category before you can select an Activity. This means that if you change one, you may have to change them all.

***Select the category that best describes your benchmark from the drop down list (e.g., Housing or Education).***

**Type of Activity**

The Benchmark Management System will provide you with a list of activities that are linked to the category that you selected. The Type of Activity is used by USDA to group similar community benchmarks for national reporting purposes.

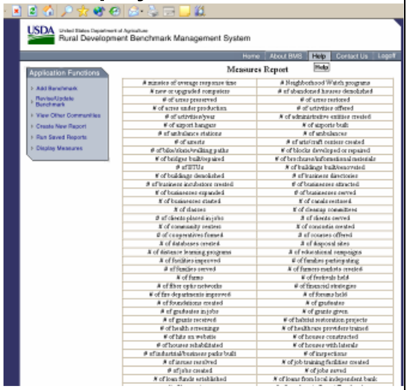
The Activity field is linked to the Category and Unit of Measurement. You must select an Activity before you can select a Unit of Measurement. If you change the Activity, you will have to reenter the Unit of Measurement.

***Select the activity that best describes your benchmark from the drop down list (e.g., Single Family Housing or Job Training).***

**Unit of Measurement**

A unit of measurement shows your progress towards meeting a goal. <u>A benchmark may have several outputs</u> (30 new housing units constructed, 30 new homeowners, 15 jobs created), but you should choose only one of these as your main indicator. Choose something that reflects progress toward addressing the goal (e.g., "number of housing units constructed", not "number of programs started"). Adding additional units of measurement, called Secondary Outputs will be discussed later.

**Display All Measures**




The Benchmark Management System will provide you with a list of performance measures that are linked to the category and activity that you selected earlier. Other communities with similar activities are using these measures, or the measures are recommended by USDA RD as being appropriate for the category. Select a performance measure from the existing list if at all possible. This will help make reporting consistent among different communities. If you do not find an appropriate measure, you can select from the entire list of measures available in the Benchmark Management System by clicking with your mouse on the underline link "show all measures". Login to the system and select Display All Measures, which will contain a complete list of all the available units of measure in the system.

If the measure you would like to use is unique and not listed in the system, you may request that it be added. You can send this request to your Desk Officer. You need to provide the name of the unit of measurement, the type of activity and category it is linked to, and an explanation of why your benchmark cannot be measured using the existing choices. In the meantime, you must select a different measure in order to complete your benchmark addition. Unit of measurement is a required field, and the system will not allow you to submit data without selecting a measure.

If you change the Category and/or Activity, your unit of measurement, baseline, and target information will be automatically erased. You will have to reenter this information.

**Source of Data**

Please indicate where you will get your information. The data should be readily available each year so that you can evaluate your progress and report on outputs. Ideally, it should be the same source for both the baseline and benchmark target.
***Enter the source of data for your benchmark.***

**Baseline**

The baseline is the starting points for the benchmark and it will often be zero. If the baseline is a number other than zero, this means that you have documented a starting point in a benchmark that had a pre-exiting output level, e.g. "# of houses constructed," "miles of sewer lines." The reason for choosing this number needs to be explained in the Notes section of the benchmark. If you enter "2" as the baseline and do not enter what this number means in the Notes section it will be hard for those reviewing the benchmarks who may not be familiar with the specifics of this project to know what this starting point means.

Enter the baseline for your benchmark. You can only enter a number in this field, not text.

**Benchmark Target**

The target is a figure that identifies the goal for your benchmark in relation to the chosen unit of measure. Hence, when you complete your benchmark you will have progressed from the baseline to the target that was set. For example, from 0 houses renovated to 20 houses renovated. <u>The relationship from baseline to the target needs to be positive; the Benchmark Management System will not register a negative relationship between the baseline and the target</u>. For example, if there are 700 people in your community on the welfare rolls and you have a benchmark goal of assisting 100 people to get off welfare you would have to select a baseline of 0 and a target of 100. You could not show a baseline of 700 with a target of 600, since the Benchmark Management System will not register a negative relationship as a success.

***Enter the benchmark target. You can only enter a number in this field, not text.***

**Submitting Data**

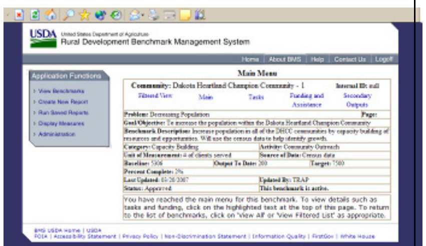
***Click on the "Submit" button once you have entered all the required information. If you have missed a required field, you will receive an error message. If you entered everything correctly, you will view the main menu for your new benchmark.***

## Email Notification

When you add a new benchmark, an email message will be sent to your USDA Rural Development State Office, and the approval status of the benchmark will be reset to "Awaiting Review." The message is sent after you log off the system.

If you are automatically logged out of the system because there was no activity for 15 minutes, an email message will not be sent. The next time you login, you will see a message on the Activity menu indicating that you have email notifications that need to be sent.

## Benchmark Main Menu




Access this function in the Application Function Menu by choosing to Revise/Update Benchmark for community users and for State Staff pick Review Benchmarks.

This page displays overview information about a benchmark and allows you to access detailed information. Note the benchmark number at the top of the chart. You can also see who has entered information about the benchmark most recently, check its review status by the Rural Development State Office, and see how much progress has been made. There is space available to record the Output to Date as you make progress on your benchmark. The field for "output to date" does not show up on the Add a New Benchmark menu. After you have finished creating a new benchmark, you must click on the main page of the benchmark and select the "edit" button in the upper right hand corner of the page. The benchmark will show a blank for the field "Output to Date," enter the number that reflects the progress for the unit of measurement for this benchmark. If no progress has taken place, enter a zero in this field; do not leave the field blank.

Across the top of the Main Menu page, you will see blue text with different headings. Main, Tasks, Funding and Assistance, and Secondary Outputs are used to "move around" in a benchmark record. Click on a heading to change pages. The Benchmark Number or Internal ID is at the top of the page.

Over the next several pages are described the Main Menu functions in Bold, which include View All, Main, Tasks, Funding and Assistance and Secondary Outputs. Smaller titles explains the functions inside each Main Menu function.

## View All

The "View All" text link takes you back to the entire list of your community's benchmarks, or if you are a state user, to a list of all communities in your state. This is explained further on page 17.

## Main

The "Main" text link will take you back to the Benchmark Main Menu if you are viewing one of the detail pages. The "detail pages" are Tasks, Funding and Assistance, and Secondary Outputs. The main menu contains overview information about a benchmark. If you make changes in this section, it may require USDA State Office review. Changes made in the Tasks, Funding and Assistance, and Secondary Outputs pages generally do not require USDA State Office review and approval. See **Appendix A** for additional information on EZ/EC benchmark review and approval process.

***At the top right-hand corner of the page is an Edit icon. Click on this picture if you want to make any changes in the information you see in the chart. To view details such as tasks and funding, click on the highlighted text.***

**Review Status**

The National Office will refer to this section when reviewing projects at the National Office, particularly when writing letters of support and approving request for USDA Rural Development set-a-sides. When an EZ/EC/REAP community applies for USDA Rural Development Program area funds (e.g. Rural Business, Rural Housing and Rural Utilities), that have been set-a-side for EZ/EC/REAP communities, the granting program agency submits a form to the National Office. This form is reviewed by the Desk Officer for that region to ensure the project and the funding are entered properly in the Benchmark Management System and the USDA State Office has approved the project. If so, the Desk Officer and the Cooperative Development Division Director will sign off on the form and fax it back to the appropriate Rural Development Program area.

Title XX Administering agencies (for Round I EZ/EC communities) should also take note of the review status of a benchmark. If a benchmark has not been reviewed by an USDA State Office for 45 days (Status = Awaiting Review), it will automatically be approved. If a benchmark is Under Review, the 45-day approval date does not take effect.

***Benchmarks must have an "Approved" status before they are eligible for SSBG spending, USDA EZ/EC Grants, or USDA set-a-side funding.***

## Tasks Page

***Click on the "Tasks" text link to reach this page.***

In this section, you can add detailed information about this benchmark. This information will help you coordinate and manage activities related to your benchmark.

**Benchmark Leader(s)**

Identify who will coordinate activities for this benchmark. It can be a person or agency.

***Enter the name of the Benchmark Leader directly in the white box provided. Click on the "Update" key to save your changes.***

### Tasks

Tasks and Projects are the specific actions required to complete each benchmark. Tasks could include: apply for funding, hold a public hearing, hire a contractor, select a site, etc. Identify a task leader, projected timelines with start and end dates, and a projected budget for each task. Do not duplicate costs under multiple tasks. If the task is to seek funds, don't list the amount you seek, just the cost of applying for funding.

***Click on "Add New Task" to create a new entry. Type information in the appropriate boxes. Enter dates in the month/day/year format. Example: 07/01/2009. Click the "Submit" button to save your changes. Tasks will automatically be lettered (A, B, C) in order by the system. Click on Edit or Delete to make changes in an existing task.***

If you want to check off the box to the right of the Task to show that the Task has been completed you must click on the Edit button first or you changes will not be saved after you log out.

## Funding and Assistance Page

***Click on the "Funding" text link to reach this page.***

In this section, you can track the resources that are going into this benchmark.

### Funding Resources

Identify all funding for this benchmark not just EZ/EC funds or USDA Rural Development Funds.

When entering funding, three things must be listed:

- The Source, such as Federal Government, State Government, Local or Regional Government, Private Sector, Non profit, or Private Sector that provided the funding.
- The Agency, the name of the government agency, non-profit organization or private business that provided the funding.
- The Program that is the specific name of the program within the organization or agency that provided the funding and if there is more than one entry of funding from a source add a reference to the project being funded.

The Source for funding must be selected from the pull-down screen. If the agency is part of the Federal government it can be selected from the list on the pull-down screen, if the federal agency is not listed you can select the word "other" and add the name of the federal agency along with the program information under the field for "program."

If you select the source as "private sector" or "non-profit" list the name of the organization under the "agency" field. Do not leave it blank. All funds entered must be accounted for, and the appropriate Source, Agency and Program identified

As mentioned before, if there are multiple sources of funding from one source/agency enter the name of the agency and the relevant program information, but also add a reference to the project in which the funds will be used. For example, if you have more than one grant from USDA Rural Development from the Community Facilities program, identify which project under this benchmark will utilize these funds. See the Training Housing Benchmark at the end of this manual as an example.

Funds Received are those that have been received and are currently available for use. Funds Requested are those funds you have actually written applications for and submitted to the funding agency. **Do not enter funding requests that you are considering. Rather, wait until a grant or loan request is actually submitted.**

Benchmarks that will not be allocated SSBG dollars or USDA EZ/EC grant funds by the community still need to be entered into the Benchmark Management System and all funding needs to be listed like any other benchmark. The proper way to enter EZ/EC funds is listed below:

**Round I EZ/EC Community**
List SSBG dollars in the funding section as shown below:
**Source**- SSBG from Designation or RII or RIII USDA EZ/EC grant
**Agency**-Dept. of Health and Human Services or HHS
**Program**-EZ/EC

**Round II or III EZ/EC Community**
List USDA EZ/EC grant dollars in the funding section as shown below:
**Source**-SSBG from Designation or RII or RIII USDA EZ/EC grant
**Agency**-USDA Rural Development
**Program**-EZ/EC

It is extremely important to be consistent when entering funding information. Review all the Source and Agency selections closely to choose the best option. Funds that are from USDA Rural Development should be identified as such; they should not be placed in the "other Department of Agriculture agencies" category. All agencies and grants should be identified by their specific name; use the "Other" option only if the agency is not listed. Remember, only make an entry into the funding section when a grant or loan request has actually been submitted.

When applying for funding enter the amount of funding that has been applied for under the "amount requested" column and a zero in the "amount received" column. Then if the funds are granted, change the zero in the "amount received" column to the amount of funding that has been awarded. If the amount awarded is less than the amount requested **do not** change the amount requested to the amount awarded. Those reviewing the benchmarks will anticipate that the community will seek other sources of funds to cover the shortfall. **Do not enter a zero in the amount requested once funds have been received despite what earlier versions of the training manual may have implied.**

***Click on "Add New Funding" to add new information. Enter information in the white boxes provided. You must enter a Source/Partner for all Funds Received. When you are finished, click on the "Submit" button to save your changes. Click on "Edit" or "Delete" to make changes in existing funding information.***

### Technical Assistance and In-Kind Resources

Identify the non-monetary things you have secured (in-kind, technical assistance, or volunteer resources). Be creative. Start with resources already available. Identify the partners (private, non-profit, local, state, and federal) that can help you. Then enter the type of contribution and the quantity of in-kind or technical assistance. The "Quantity" field will only accept numbers, not text. Therefore, describe the assistance under the type of contribution in such as way that a number can measure it. For example, the source might be AmeriCorps. The type of contribution would be 20 volunteers for 8 Saturdays (160 days of volunteer assistance). The Quantity would be 160.

***Click on "Add Assistance" to add new information. Enter the information in the white boxes provided. Click on the "Submit" button to save your changes. Click on "Edit" or "Delete" to make changes in existing Assistance information.***

## Secondary Outputs Page

***Click on the "Secondary Outputs" text link to reach this page.***

In this section, you can document additional successes and record comments about your benchmark.

**Secondary Outputs**

Secondary Outputs are measurable outputs that are in addition to the benchmark's primary unit of measurement. The Category, Activity and Performance Measure lists are treated the same as the Add a Benchmark page. You may create as many Secondary Outputs as you need.

***Click on Add Secondary Output to add new information. Select a category and Activity from the drop down lists. Click on Edit or Delete to change an existing output measure.***

**EZ/EC Key Indicator Report (Unit of Measurements)**

Many Secondary Outputs are key national indicators that USDA uses to compare the progress of all EZ/EC, REAP and Champion Communities. When you select the option to create a secondary output, the list will only contain indicators that you have not already selected for that benchmark.

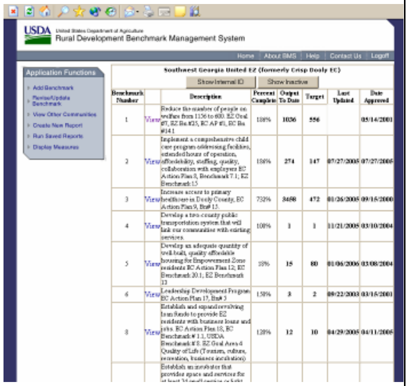
**The Secondary Outputs component of the benchmark system is a very important tool to measure the aggregate benefits that have occurred in a community because of completing a benchmark.**

Some of the key indicators to consider include:
# of jobs created
# of jobs saved
# of clients placed in jobs
# of clients served
# of loan funds established
# of loans given
# of buildings built/renovated
# of houses constructed
# of houses rehabilitated

**Notes**

This is an optional section for community use, but it is very useful for helping communities explain pertinent information about the benchmark. Communities can describe the progress of a benchmark (e.g., Delayed due to bad weather, scaled back project due to lack of funding, extremely successful program will be duplicated elsewhere). This section can also be used to record information about community meetings or public outreach related to this benchmark. If a baseline other than zero is chosen, you can use the Notes section to explain the figure that was selected. You will find it extremely useful to date each of these entries in the Notes section. When dated, these entries give a time line of events. The Notes section will assist in the USDA State Office review of the benchmark.
***Enter comments in the white box provided for notes***.
***Click on the "Update" button to save your changes.***

# Revise/Update Benchmarks



***Click on "Revise/Update Benchmarks" in the Application Function Menu to reach this section, available to community users. For USDA State Office Staff, click on Review Benchmarks***

If you select this link, you will be taken to a list of all benchmarks for your community.

**We strongly suggest that every community update its benchmarks on a monthly basis.** This includes updating the outputs to date, task information, funding information, secondary outputs and relevant information in the notes section.

Communities that do not update their benchmarks periodically will risk losing eligibility for USDA Rural Development set-a-side funding and letters of support for grant applications. Communities that persist in neglecting to update their benchmarks will have all SSBG dollars and USDA EZ/EC grant funds suspended and will be considered for revocation of their Empowerment Zone, Enterprise Community or Champion Community status.

## Annual Benchmark Report

Every August all Empowerment Communities will be required to complete an **Annual Benchmark Report**. The report is a "Detailed Report" of each community's benchmarks. Those communities that have outdated information will be required to update all the information in their benchmarks or face the penalties listed above until they comply.

[Note: All users will be able to view information about benchmarks, but only community users have the ability to revise or update information.]

### Show Inactive

At the top of the page is a button that says "Display Inactive". You can use this button to display only current benchmarks or to view them all. Only a community user has the ability to designate a benchmark as active or inactive, but all users can display all benchmarks.

Changes to existing Benchmarks should be made from the Benchmark Main Menu. Refer to the section on **Add a Benchmark** (Page 6) for detailed explanations of each page.

***Click on the "Internal ID" button to display benchmarks by their Internal ID instead of their Benchmark Number.***

**Show Internal ID**

[Note: This feature is only available to community users.] This feature allows community users to display their benchmarks using an internal numbering system, rather than the official USDA benchmark number. The benchmarks will be listed from the smallest to largest numbers.

**View**

Community users will see the word "View" in blue text next to each Benchmark Number or Internal ID. State and National Office users will see the community name in blue.

To view detailed information about a benchmark, click on the blue text for a Benchmark. This will take you to the Main Menu for that benchmark. To return to this page later, click on "View All" at the top of the Benchmark Main Menu. For State Staff, chose the community you wish to filter by to see all the benchmarks.

**Preparing for the Annual Benchmark Report**

The Annual Benchmark Report, mentioned earlier in this section, consists of a printout of all the data for your community's benchmarks that is in the system. **If you keep your benchmarks updated on a regular basis, you will not have any additional work for the report.** When updating your benchmarks, take special note of the following items:

- Output to Date
- Secondary Outputs
- Budgets for Tasks
- Funding and Technical Assistance Resources
- Tasks Done

## USDA State Office Review Page

[Note: Community users do not have access to this activity.] While in the Main Menu page, state users can change the review status of a benchmark. Every time a significant revision is made to a benchmark, the review status will reset to "Awaiting Review." Refer to **Appendix A** for guidelines on what is considered a "significant revision" and the factors to consider in reviewing a benchmark.

A USDA State Office may request that the community provide information in their benchmark submission to assist in the review. This information includes the page numbers from their strategic plan that refer to a benchmark or comments in the Notes section to indicate when community outreach meetings took place. However, additional documentation or information may still be needed to complete the review. **USDA State Offices are responsible for keeping the Title XX Administering Agencies (for Round I EZ/EC communities only) informed about changes to community benchmarks.**

Click on Add Entry to indicate whether the benchmark is awaiting review, under review, approved or denied. The lead community representative will be notified of your review action by email.

## Email Notification

When a community adds a new benchmark or significantly changes an existing one, an email message will be sent to the USDA State Office automatically, and the approval status of the relevant benchmarks will be reset to "Awaiting Review."

If you are automatically logged off the system because there was no activity for 15 minutes, an email message will not be sent. The next time you login into the system, you will see a message on the Activity menu indicating that you have email notifications that need to be sent.

# View Other Communities

***State and Community Users access this section by selecting "View Other Communities" in the Activity Menu. National Office users access this section by selecting "View Benchmarks" from the Activity Menu.***

This section allows communities and state users to view the activities of other communities. It was added to the Benchmark Management System based on feedback from users. Since all communities receive federal funding, benchmark information is considered public. Community users may find it useful to see how others have financed or managed activities similar to those they are planning.

## Filter Benchmarks Page

***You can filter your view of community benchmarks in one of two ways:***

***Option 1: Select State(s) and Community Type(s)***
***Option 2: Select specific communities by name***

You can only use one type of filter criteria. If you select specific communities, the system will ignore anything you have selected in the State or Community Type section.

***To select more than one menu item, hold down the "Control" key on you keyboard while you click on items. Click on the "Submit" button when you are ready.***

You will be taken to a page that contains the same information as the "View Benchmarks Page."

### Hide Filter

After you have selected filter criteria, you can hide the filter criteria at the top of the page.

### Change Filter

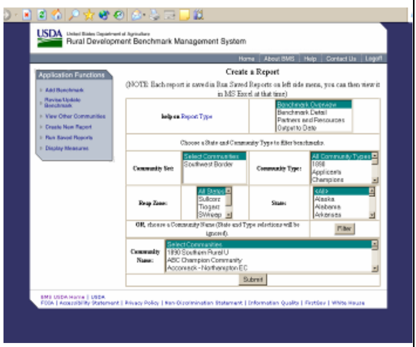
You can also change the criteria that you selected. By choosing new items and clicking on the "Change Filter" button.

# Create New Report

The Benchmark Management System includes built-in reports that allow you to print out the information in the system. These reports are useful for internal community management, providing information to the public as well as state and national reporting purposes. For example, a standard progress report can be printed out every month for Board meetings. The reports also provide an overview of progress by totaling the amount of funding received or "jobs created" for selected benchmarks.

## Report Menu

At the top of the reports menu, there is a box that lists the four types of reports available:




- **Benchmark Overview Report:** This report will allow you to display summary information about more than one benchmark. You will not be able to view tasks/projects or funding by source in this report. This type of report is an excellent handout for board meetings and public meetings to illustrate progress to date on every benchmark.

- **Benchmark Detail Report:** This report will allow you to view detailed information about benchmarks, including tasks/projects, funding by source, and assistance received. This is type of report is similar to the Benchmarking Worksheets provided in the *Guide to Implementation and Benchmarking for Rural Communities.* It is also used for the Annual Benchmark Report discussed earlier.

- **Partners and Resources Report:** This report displays funding, assistance and partners for one or more benchmarks. This report is very useful in determining the total amount of funds leveraged by a community and is a useful tool for developing articles for a community newsletter or other media.

- **Output to Date Report:** This report displays output information for one or more benchmarks. This report measures the output to date of all the units of measurement and helps to give a quick total of the benefits brought about by the EZ/EC, REAP Zone or Champion Community.

***Select the type of report you want from the list at the top of the page.***

#### Filter Benchmarks

You must also select filter criteria for the benchmarks. This is the same as the Filter Benchmarks menu in the View Benchmarks and View Other Communities sections.

***You can filter your view of community benchmarks in one of two ways:***

***Option 1: Select State(s) and Community Type(s)***
***Option 2: Select specific communities by name***
You can only use one type of filter criteria. If you select specific communities, the system will ignore anything you have selected in the State or Community Type section.

***To select more than one menu item, hold down the "Control" key on you keyboard while you click on items. Click on the "Submit" button when you are ready.***

Once the communities you want to include in the report have selected, you can also filter down by selecting only those benchmarks that fall under a particular Category or Activity.

## Benchmark Overview Report

If you selected the Benchmark Overview Report, you will see the settings menu for this report.

#### Choosing Report Settings

You can create a title for this report, or it will be given this default title automatically:

Overview_Mar_03_2008 - General Overview Report

***Enter a title for the report if you do not want the default title.***

Next, you must select the benchmarks you want to include. The default setting is all the benchmarks of your selected communities.

***Select the benchmarks you want to include. Hold down the "Control" key on your keyboard to select more than one item.***

You have the option of displaying the Benchmark Number, Benchmark Description or both items. [You can select Internal ID as a sorting feature in the following sections.] You also have the option of displaying active benchmarks only or all benchmarks. The default settings are for both Benchmark Number and Benchmark Description to be included, and for only active benchmarks to be displayed.

**Display Options**

***Select the display options you want.***

Next, choose the items you wish to view. These items will be displayed as columns across the top of the report. You will be able to view all items on your computer screen, but the number of items you can print out is limited by your page width. Change the page setup in your web browser to landscape or horizontal in order to print more items. You should be able to print about seven or eight items in one report. Use the Print Preview in your web browser to see how many items you can include. You will need to create more than one report to print out all the items.

***Click on the boxes by each item to add or remove check marks. Click on the "Select All" button if you want to place check marks in all boxes. Change the page setup in your web browser if you want to print more items.***

You have the option of changing the sort order of the report. The default sort will be benchmark number. If you want to view information by Internal ID, select that instead.

***Select another option if you do not want information sorted by Benchmark Number.***
***Click on the "Submit" button when you are ready to create the report.***

You will be taken to the report view. The column headings at the top of the page are the items you selected.

**Changing Sort Order**

The data is displayed according to the sort order you selected. You can change the sort order by clicking on any of the column headings.

***Click on any column heading to use it as the sorting item.***

**Changing Report Settings**

***To change your report settings, close the current window, which will reveal the Report Menu screen again. Make your changes, select either "Submit New Report" or "Replace Existing Report" as appropriate. Reminder all created reports are saved under Run Saved Reports.***

**Printing**

To print this report, use the Print function in your web browser.

**Save Report Settings**

The report just created, saves automatically for future use and the information will be automatically updated. To save the specific contents of this particular version of the report see page 30.

#### To Create Another Report

If you want to create another report, click on "Create New Report" in the Application Functions Menu on the left side of your screen.

## Benchmark Detail Report

***If you selected the Benchmark Detail Report, you will see the settings menu for this report.***

#### Choosing Report Settings

You can create a title for this report, or it will be given this default title automatically:

Detail_Mar_03_2008 - Benchmark Detail Report

***Enter a title for the report if you do not want the default title.*** Next, you must select the benchmarks you want to include; the default setting is all the benchmarks of the selected communities.

***Select the benchmarks you want to include. Hold down the "Control" key on your keyboard to select more than one item.***

You have the option of displaying benchmarks by Benchmark Number or Internal ID. You also have the option of displaying active benchmarks only or all benchmarks. The default is set to display by Benchmark Number, and including only active benchmarks.

***Select the display options you want.***

Next, choose the items you wish to view.

Click on the boxes by each item to add or remove check marks. Click on the "Select All" button if you want to place check marks in all boxes.

Click on the "Create Report" button when you are ready to create the report.

#### Viewing Benchmark Data

A separate window will appear displaying your report. Since this report has a large amount of detail, you will only be able to view and print 10 benchmarks at a time. This is designed to prevent Benchmark Management System from "crashing" or "timing out" from heavy use. At the top of the page, you will see "First 10," Previous 10," "Next 10" and "End." Navigate through your benchmarks in blocks of ten using these buttons.

#### Changing Report Settings

***To change your report settings, close the current window, which will reveal the Report Menu screen again. Make your***

***changes select either "Submit New Report" or "Replace Existing Report" as appropriate. Reminder all created reports are saved under Run Saved Reports.***

### Printing

You can only print the benchmarks that are currently displayed on your screen, which means that you can only print 10 benchmarks at a time.

Use the Print function in your web browser to print the benchmarks that you are currently viewing. You can only print 10 benchmarks at a time.

**Unfortunately when printing benchmarks they will not always fit neatly on to one page, it depends on the amount of information listed under each of the fields.**

### Saving Permanetly a Current Report

To permanently save the report, there are 2 methods. The first option is to select at top right-hand corner, File, Save, choose a location on your computer and give it name, click save.

The second option: go to Saved Reports, find your report, select "view with Excel" or click on the Report Title, once open, save this file your computer.

### To Create Another Report

If you want to create another report, click on "Create New Report" in the Application Functions Menu on the left side of your screen.

## Partners and Resources Report

If you selected the Partners and Resources Report, you will see the settings menu for this report.

### Choosing Report Settings

You can create a title for this report, or it will be given this default title automatically:

Partner_Resource_Mar_03_2008 - Partners and Resources Report

***Enter a title for the report if you do not want the default title.***

Next, you must select the benchmarks you want to include. The default setting is all the benchmarks of your selected communities.

***Select the benchmarks you want to include. Hold down the "Control" key on your keyboard to select more than one item.***

This report is organized by Source/Partner. These are listed in the next drop down box. Sources can be selected by highlighting the appropriate text. If you want to choose sources in a random order, hold down the "Control" key on your keyboard as you click on benchmark numbers.

***Select the Sources/Partners you want.***

You have the option of displaying Funding data only, Assistance data only, or both. You also have the option of displaying active benchmarks only or all benchmarks. The default setting is for Funding data only to be included, and for only active benchmarks to be displayed.

***Select the display options you want.***
***Click on the "Submit" button when you are ready to create the report.***

You are now in the report view. The report will total the Funds Received and Funds Requested from each Source/Partner.

**Changing Report Settings**

***To change your report settings, close the current window, which will reveal the Report Menu screen again. Make your changes select either "Submit New Report" or "Replace Existing Report" as appropriate. Reminder all created reports are saved under Run Saved Reports.***

**Printing**

Use the Print function in your web browser to print this report.

**Saving Permanetly a Current Report**

To permanently save the report, there are 2 methods. The first option is to select at top right-hand corner, File, Save, choose a location on your computer and give it name, click save.

The second option: go to Saved Reports, find your report, select "view with Excel" or click on the Report Title, once open save this file your computer.

**To Create a New Report**

If you want to create another report, click on "Create New Report" in the Application Functions Menu on the left side of your screen.

## Output to Date Report

### Choosing Report Settings

If you selected the Output to Date report, you will see the settings menu for this report.

You can create a title for this report, or it will be given this default title automatically:

Output_Mar_03_2008 - Output To Date Report

***Enter a title for the report if you do not want the default title.***

Next, you must select the benchmarks you want to include. The default setting is all the benchmarks of your selected communities.

***Select the benchmarks you want to include. Hold down the "Control" key on your keyboard to select more than one item.***

You can filter your view of outputs in one of two ways to view outputs.
***Option 1: Select Category and Activity***
***Option 2: Select specific performance measures.***
You can only use one of these two options. If you select performance measures, the system will ignore any category and activity selections.

Select the filter criteria for your outputs.

You can view outputs by performance measures only or sorted by categories and activities. You also have the option of displaying active benchmarks only or all benchmarks. The default setting is for active and inactive benchmarks to be included, and outputs displayed by performance measures only.

***Choose the display settings you want.***

You can also choose a time limitation for your report. You can specify a start and end date, based on four quarters each year. The default is to include all outputs, regardless of date.

### Changing Report Settings

***To change your report settings, close the current window, which will reveal the Report Menu screen again. Make your changes select either "Submit New Report" or "Replace Existing Report" as appropriate. Reminder all created reports are saved under Run Saved Reports.***

### Printing

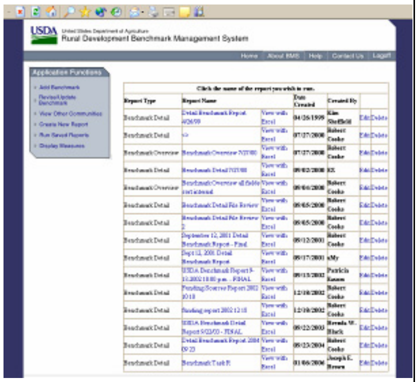
Use the Print function in your web browser to print this report.

| | |
|---|---|
| **Saving Permanetly a Current Report** | There are 2 methods to permanently save a report. The first option is to select at top right-hand corner, File, Save, choose a location on your computer and give it name, click save.<br><br>The second option: go to Saved Reports, find your report, select "view with Excel" or click on the Report Title, once open save this file your computer. |
| **To Create a New Report** | If you want to create another report, click on "Create New Report" in the Application Functions Menu on the left side of your screen. |

# Run Saved Reports

*Click on the Run Saved Reports text in the Application Functions menu the left side of your screen.*

## Existing Reports Page




You are now at the Existing Reports Page. You will also see this page after you have saved a report. The chart on this page will display only those reports that have been created by your office (community, state or National Office). You can create reports using the same display options as a report you have previously run. These reports will display the most current data available in the system.

**A feature of this menu is the ability to choose to have your report displayed in an Excel format.**

***To view a report, click on the name of the report. To make changes to it, click on Edit or Delete.***

If you choose to edit a report, you will be taken back to the Reports Menu Page. After you change the menu items, you have the option of saving the changes to that existing report or saving them as a new report.

***Select the options you want to change, if desired.***

## Saving Reports with Specific Data for Later Use

The Benchmark Management System allows you to save report settings so you can re-run reports over and over again confident that the recurring reports you generate from your community's data will be consistently displayed, but updated with all the latest information in the system.

You also have the ability to save a static report of your benchmark information to keep as snapshot of where your community was at a particular point in time. Some communities like to keep these as annual report for comparison from year to year.

To permanently save any of the reports you may have created (along with all its formatting), in a "static form" follow these simple steps.

### First Way to Save Report

Locate your report by first going to the "Run Saved Reports" in the Application Functions menu.

1. When you have determined which report you wish to save, right-click on the report and choose the "Save Target As" option.
2. In the pop up window, choose a file name and a location to save your file. The file type will be html; this file can be read by your browser or edited with most word processing programs. The same method works for the Excel version.
3. Click the "Save" button and you are done.

### Second Way to Save Report (Excel Format)

1. Locate your report by first going into the "Run Saved Reports" in the Application Functions menu.
2. When you have determined which report you wish to save, choose the "View with Excel" option to run the report.
3. After the report has run and is displayed on your screen, drop down the "file" menu on your browser and select the "File As" option.
4. In the pop up window, choose a file name and a location to save your file. The file type will be an Excel workbook (.xls); this file can be opened by Excel.
5. Click the "Save" button and you are done.

***Remember these static reports will not update with the latest information in the Benchmark Management System.***

# Display All Measures

This page displays all the performance measures that are currently available in the Benchmark Management System. You can print this out using the "Print" function in your web browser.

## Log Off

Use the "Submit" or "Update" buttons to save your changes before logging off. If the system does not detect any activity for 15 minutes, it will automatically log you off. This is to prevent USDA's server from being "tied up" with log-ins that are not active.

Click on Log Off (upper right-hand side) when you are ready to exit the Benchmark Management System. You will be taken to USDA home page upon exiting.

# Administrative Functions

This section contains instructions for the Administrator.

The Benchmark Management System Administrator will periodically need to make changes in the system to make sure it is operating smoothly. The Administrator can add, edit and delete information by using the following Administrative Functions:

Edit Categories
Edit Activities
Edit Performance Measures
Link Activities and Measures
Edit Sources
Edit Agencies
Edit Support Progress Report Types*
Edit Support Action Types*
Edit Community Sets
Edit Community Information
Edit Community Types
Edit State Office Information
Edit Progress Reports
Edit Community Set Communities
Edit Community Users

*These functions are not used at this time.

### Editing

The editing menus work the same for all the functions. The chart at the top of each page allows you to edit or add information, and the list of existing entries appears in the chart below.

***Type in the box to add a new entry, and then click on the "Submit" button. Click on "Edit" to make changes to an existing entry. Type the changes in the box in the top chart, and then click on the "Submit" button to save the change. Click on "Delete" to remove an entry. You will not be able to delete any entry that has benchmarks linked to it.***

## Categories, Activities, and Performance Measures

Each Activity must be linked to a Category, and each Measure must be linked to at least one Activity and Category. In the Edit Activities Page, you will see the word "Measures" highlighted and underlined for each existing activity description. If you click on this text, you will be taken to the Link Activities and Measures Page.

## Link Activities and Measures

In this section, you can link a performance measure to additional categories and activities. For example, you may want to add the "# of jobs created" measure to Category: Education, Activity: Alternative Schools. In the Add a Benchmark or Secondary Outputs sections, a community may choose a performance measure that is not currently linked to the Activity and Category they have selected (from the View More Measures list). Once they submit this choice, a link is automatically created between that measure and the new activity and category.

***Select a Category and Activity from the drop down lists. You will then see a list of the measures that are currently linked. If you do not see the measure you want, select it from the drop down list of all measures. Click on the "Link Activity and Measure" button. You must do the last step to save your change.***

## Sources and Agencies

These items can be edited in the same way as categories, activities and measures.

## Community Information

Use this section to keep community contact information current or to add new communities. Each community must be linked to at least one state. Each community should be identified by a community type. There should be only <u>one main email contact</u> for each community; inform your Desk Officer if your email address changes.

## Community Types

Use this section to add new community types or to edit existing ones.

## State Office Information

Enter the name of the USDA Rural Development State Office Contact in this section. It is important that these names and email addresses <u>are kept current</u>, because the Benchmark Management System will send notification of benchmark changes to this individual. If there are 2 or more coordinators, one person needs to be assigned to receive these emails. When the coordinator changes, update this information and inform the Role-Based Administrator in St. Louis for Benchmark Management System.

## Community Users

See Registering Users, next section.

## Registering Users

This section reviews the process that is dispersed throughout this manual. In order for anyone to use the Benchmark Management System, they must be given permission to use it. This is done in 2 ways and depends upon your role, whether you are a community user or an RD employee.

**Community Users**

Community Users - when a community representative changes or a new person needs access to the Benchmark Management System,

1. They must obtain a USDA eAuthentication Level 1 ID. This information is located on page 3. Once they have this ID, they need to Login to the Benchmark Management System and provide the requested information (Name, Community Name and Contact information). Once it is submitted, an email is sent to the main administrator, the same person named in the Contact or Help button in the top menu bar.
2. The Main Administrator will Login into the Benchmark Management System and go to Administration, under the function, Community Users, edit the new person, follow the instructions and confirm their registration to use the Benchmark Management System.
3. Send an email to the appropriate Desk Officer or the community user letting them know they are registered to use the Benchmark Management System.
4. The administrator needs to transfer this new information to Community Information, if they are the primary community contact, so they will receive emails from the Benchmark Management System when the USDA State Office has approved or denied a benchmark.
5. Changing a community user's access to the Benchmark Management System - Using the function, Community Users, you can edit a user's access to the Benchmark Management System. Remember to change that persons email and name under Community Information.
6. To remove or change BMS access for a community user - edit under Community User and change all boxes to Choose One. This person will no longer be able to access the BMS.

Note:
The Community User function is just a means to register a community user; it does not automatically update the information under the function, Community Information.

**Rural Development Staff**

Is sub-divided into 2 categories:

State (Field) Office Employees - When a RD employee needs access to the Benchmark Management System or their current access needs to change, (i.e., either a different state or access removed) an email should be sent to the Desk Officer. The Main Administrator once notified, will need to send an email to the Role-Based Administrator advising that person of the change. Reminder do not forgot to update State Office Information, so that the Benchmark Management System can send benchmark changes to the correct Field Office person.

National Office Staff - for those who need administrative control, they will need to work through the Main Administrator who will inform the Role-Based Administrator of any National Office Benchmark Management System Access changes.

# Appendix A

## EZ/EC Benchmark Review & Approval Process

Email addresses in the Benchmark Management System must remain current, in order for the review process to work effectively. There should be one main contact for Empowerment Communities at each State Office who will receive the email notifications. National Office must be informed immediately of personnel changes at the State Office level. Changes should be sent to the desk officer for that region.

# Appendix B

## 2008 Changes to the System

In 2008, the Benchmark Management System was rewritten in a new computer programming language, with a new look and feel, and eAuth was added to the system. This preserved all functions, a few changes occurred which are reflected in this section.

- Partners and Resources Report - The ability to do quarterly reports never worked properly and was eliminated.
- Create a Report - for all reports - BMS will automatically save all reports and can be found at anytime under Run Saved Reports in the Application Function Menu Section. (page 21)
  Tip: If you create many reports, it maybe useful to clean out/delete reports not used periodically.
- The applications functions have been condensed but functions remains the same between changes made in BMS and the new top menu bar (see #7).
- A menu bar has been added at the top. The functions contained within the menu are self-explanatory.

# Appendix C: Examples

## Training Housing Benchmark Part I Setting Up the Benchmark Structure

### Items to Notice in the Benchmark

- The benchmark description, goal, and problem are focused, feasible and measurable.
- The unit of measurement directly correlates with the problem identified and the goal that is outlined.
- The funding section clearly identifies each source of funding that will be applied for and the amount.
- The notes section provides relevant information about the status of this benchmark
- The benchmark utilizes secondary measurements to capture all the benefits that will occur as a result of this benchmark.
- Each task has a specific task leader, proposed budget, start date and end date.

## Main Section of a Benchmark

| | | | | | |
|---|---|---|---|---|---|
| **Community: Training Housing Benchmark EC - 1** | | | | | EDIT |
| Main | Tasks | Funding and Assistance | Secondary Outputs | View All | DELETE |
| **Problem:** Lack of affordable single family housing | | | | | **Page:** 42-45 |
| **Goal/Objective:** Construct 12 new single family houses and rehabilitate 10 houses over the next two years to assist low-income families in the EC area. | | | | | |
| **Benchmark Description:** Construct 12 affordable single family houses and assist families to move into these homes and rehabilitate 10 houses over the next two years. | | | | | |
| **Category:** Housing | | | **Activity:** Single Family | | |
| **Unit of Measurement:** # of houses constructed | | | **Source of Data:** Local Housing Authority | | |
| **Baseline:** 0 | | **Output To Date: 0** | | **Target:** 12 | |
| **Percent Complete:** 0% | | | | | |
| **Last Updated:** 8/24/06 | | | **Updated By:** JOHN SMITH | | |
| **Status:** Under Review | | | **This benchmark is active.** | | |

## Tasks Section

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Tasks and Projects** | | | | | | | | |
| **Training Housing Benchmark EC - 1** | | | | | | | | |
| Main | Tasks | Funding and Assistance | Secondary Outputs | View All | | | | |
| Benchmark Leader: Housing Subcommittee | | | | | | | | |
| **Task** | **Task Description** | **Task Leader** | **Start Date** | **End Date** | **Budget** | **Task Done** | | |
| A | Identify land for construction | Mark Asbrey of Housing Subcommittee | 1/15/05 | 3/15/05 | $500 | | Edit | Delete |
| B | Seek grants for housing construction | Paul Skorshod of Housing Subcommittee | 1/15/05 | 12/15/05 | $5,000 | | Edit | Delete |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| C | Acquire Land for construction | Kristie Lokken of Housing Subcommittee | 3/16/05 | 6/15/05 | $200,000 | | Edit | Delete |
| D | Establish construction plans and hire contractors | Steve Andersen of Housing Subcommittee | 6/15/05 | 8/15/05 | $1,000 | | Edit | Delete |
| E | Inform the public about the program and establish selection criteria for housing rehabilitation applicants | Lauren Helms of Housing Subcommittee | 3/15/05 | 5/15/05 | $0 | | Edit | Delete |
| F | Select the ten housing applicants for rehabilitation | Housing Subcommittee | 6/1/05 | 6/10/05 | $0 | | Edit | Delete |
| G | Begin construction of new houses | Housing Subcommittee | 7/10/05 | 9/1/06 | $700,000 | | Edit | Delete |
| H | Begin rehabilitation of ten houses | Bob Vela of Housing Subcommittee | 6/15/05 | 6/15/06 | $150,000 | | Edit | Delete |
| I | Create application process for families seeking to purchase new homes | Lauren Helms of Housing Subcommittee | 4/15/06 | 6/15/06 | $0 | | Edit | Delete |
| J | Notify families selected for home purchasing program | Kristie Lokken of Housing Subcommittee | 6/16/06 | 6/16/06 | $0 | | Edit | Delete |
| K | Develop and implement home educational and ownership program | Mark Asbrey of Housing Subcommittee | 6/15/06 | 7/15/06 | $2,500 | | Edit | Delete |
| L | Acquire funds to assist home buyers | Angela Hayes of Housing Subcommittee | 6/16/06 | 7/30/06 | $2,000 | | Edit | Delete |
| M | Qualify home purchasers and arrange financing, close on homes | Erik Samuelson of Housing Subcommittee | 7/1/06 | 8/30/06 | $10,000 | | Edit | Delete |
| | | | **Total Budget:** | | **$1,063,082** | | | |
| | | | Help on Tasks | | | | | |

## Funding and Assistance Section

| **Funding and Assistance** | | | | | | |
|---|---|---|---|---|---|---|
| **Training Housing Benchmark EC - 1** | | | | | | |
| Main | Tasks | Funding and Assistance | Secondary Outputs | View All | | |
| | | **Funding** | | | | |
| **Partner** | **Agency** | **Program** | **Funds Received** | **Funds Requested** | | |
| SSBG from designation | HHS | EZ/EC | $50,000 | $100,000 | Edit | Delete |
| Federal government | USDA Rural Development | 504 | $0 | $250,000 | Edit | Delete |
| Non-profit | Neighborhood Reinvestment Corp. | Home Owner Rehabilitation Grants | $0 | $12,000 | Edit | Delete |
| Private sector | Wal-mart | Community grants | $0 | $1,000 | Edit | Delete |
| State government | Dept. of Commerce | Housing Assistance Program (HAP) | $0 | $20,745 | Edit | Delete |
| Federal government | USDA Rural Development | Housing Preservation Grant | $0 | $75,000 | Edit | Delete |
| Non-profit | Presbyterian Church | One great hour of sharing | $0 | $5,000 | Edit | Delete |
| Private sector | Regional Banks | Community Development and Outreach (low-interest housing loans) | $0 | $600,000 | Edit | Delete |
| Non-profit | Housing Assistance Council | We Build | $0 | $30,000 | Edit | Delete |
| Local or regional government | Local and county government | Housing Operation | $50,000 | $50,000 | Edit | Delete |
| | | **Totals:** | **$100,000** | **$1,143,745** | | |
| | | | Help on Funding | | | |

## In-Kind and Technical Assistance

| In-Kind and Technical Assistance | | | | | | |
|---|---|---|---|---|---|---|
| **Sources/Partner/ Volunteers** | **Type of Contribution** | **Quantity** | | | | |
| Habitat for Humanity | 20 volunteers for 8 Saturdays (160 days of assistance) | 160 | Edit | Delete | | |
| The ten homeowners selected for housing rehabilitation | Sweat Equity of 250 hours (10 homeowners for 250 hours) | 2500 | Edit | Delete | | |
| A real estate agent will provide a seminar to the ten potential home buyers on the process of purchasing a home | One free seminar for ten participants | 1 | Edit | Delete | | |
| A local financial planner is going to provide a free seminar on creating household budgets, keeping good credit, and ways to curb debt | one free seminar for ten people | 1 | Edit | Delete | | |
| | | | Help on Assistance | | | |

## Secondary Outputs Section

| Secondary Outputs | | | | | | |
|---|---|---|---|---|---|---|
| **Training Housing Benchmark EC - 1** | | | | | | |
| Main | Tasks | Funding and Assistance | Secondary Outputs | View All | | |
| **Category** | **Type of Activity** | **Output** | **Unit of Measurement** | | | |
| Housing | Single Family | 0 | # of houses rehabilitated | Edit | Delete | |
| Housing | Single Family | 0 | # of families served | Edit | Delete | |
| | | Help on Secondary Outputs | | | | |

## Notes Section

| Notes |
|---|
| The grant writing process has already begun, and we are still looking for more potential funding agencies. Discussions have begun with regional banks to arrange low interest loans for the families that will become homeowners under this housing benchmark. |

## Training Housing Benchmark Part II Updating the Benchmark

### Changes to Notice in the Updated Benchmark

- The output to date and secondary outputs have been updated to show the progress that has taken place.
- Tasks that are completed have budgets that show exact costs and the task has been checked off as completed.
- The notes section documents relevant information about the current status of the benchmark.
- As grants were applied for and received they were documented under the funding section.

**Main Benchmark Section**

| | | | | | |
|---|---|---|---|---|---|
| **Community: Training Housing Benchmark EC - 1 (Part II Updated Benchmark Six Months Down the Road)** | | | | | EDIT |
| Main | Tasks | Funding and Assistance | Secondary Outputs | View All | DELETE |
| **Problem:** Lack of affordable single family housing | | | | | **Page:** 42-45 |
| **Goal/Objective:** Construct 12 new single family houses and rehabilitate 10 houses over the next two years to assist low-income families in the EC area. | | | | | |
| **Benchmark Description:** Construct 12 affordable single family houses and assist families to move into these homes and rehabilitate 10 houses over the next two years. | | | | | |
| **Category:** Housing | | | **Activity:** Single Family | | |
| **Unit of Measurement:** # of houses constructed | | | **Source of Data:** Local Housing Authority | | |
| **Baseline:** 0 | | **Output To Date:** 4 | | **Target:** 12 | |
| **Percent Complete:** 33% | | | | | |
| **Last Updated:** 8/24/06 | | | **Updated By:** JOHN SMITH | | |
| **Status:** Under Review | | | **This benchmark is active.** | | |

## Tasks Section

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Tasks and Projects** | | | | | | | | |
| **Training Housing Benchmark (Six Months Down the Road) EC - 1** | | | | | | | | |
| Main | Tasks | Funding and Assistance | Secondary Outputs | View All | | | | |
| Benchmark Leader: Housing Subcommittee | | | | | | | | |
| **Task** | **Task Description** | **Task Leader** | **Start Date** | **End Date** | **Budget** | **Task Done** | | |
| A | Identify land for construction | Mark Asbrey of Housing Subcommittee | 1/15/05 | 3/15/05 | $432 | X | Edit | Delete |
| B | Seek grants for housing construction | Paul Skorshod of Housing Subcommittee | 1/15/05 | 12/15/05 | $7,400 | X | Edit | Delete |
| C | Acquire Land for construction | Kristie Lokken of Housing Subcommittee | 3/16/05 | 6/15/05 | $188,000 | X | Edit | Delete |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| D | Establish construction plans and hire contractors | Steve Andersen of Housing Subcommittee | 6/15/05 | 8/15/05 | $2,650 | X | Edit | Delete |
| E | Inform the public about the program and establish selection criteria for housing rehabilitation applicants | Lauren Helms of Housing Subcommittee | 3/15/05 | 5/15/05 | $100 | X | Edit | Delete |
| F | Select the ten housing applicants for rehabilitation | Housing Subcommittee | 6/1/05 | 6/10/05 | $0 | X | Edit | Delete |
| G | Begin construction of new houses | Housing Subcommittee | 7/10/05 | 9/1/06 | $700,000 | | Edit | Delete |
| H | Begin rehabilitation of ten houses | Bob Vela of Housing Subcommittee | 6/15/05 | 6/15/06 | $150,000 | | Edit | Delete |
| I | Create application process for families seeking to purchase new homes | Lauren Helms of Housing Subcommittee | 4/15/06 | 6/15/06 | $0 | | Edit | Delete |
| J | Notify families selected for home purchasing program | Kristie Lokken of Housing Subcommittee | 6/16/06 | 6/16/06 | $0 | | Edit | Delete |
| K | Develop and implement educational home ownership program | Mark Asbrey of Housing Subcommittee | 6/15/06 | 7/15/06 | $2,500 | | Edit | Delete |
| L | Acquire funds to assist home buyers | Angela Hayes of Housing Subcommittee | 6/16/06 | 7/30/06 | $2,000 | | Edit | Delete |
| M | Qualify home purchasers and arrange financing, close on homes | Erik Samuelson of Housing Subcommittee | 7/1/06 | 8/30/06 | $10,000 | | Edit | Delete |
| | | | **Total Budget:** | | **$1,063,082** | | | |
| | | | Help on Tasks | | | | | |

## Funding Section

| Funding and Assistance | | | | | | |
|---|---|---|---|---|---|---|
| Training Housing Benchmark (Six Months Down the Road) EC - 1 | | | | | | |
| Main | Tasks | Funding and Assistance | Secondary Outputs | View All | | |
| **Funding** | | | | | | |
| **Partner** | **Agency** | **Program** | **Funds Received** | **Funds Requested** | | |
| SSBG from designation | HHS | EZ/EC | $50,000 | $100,000 | Edit | Delete |
| Federal government | USDA Rural Development | 504 | $250,000 | $250,000 | Edit | Delete |
| Non-profit | Neighborhood Reinvestment Corp. | Home Owner Rehabilitation Grants | $0 | $12,000 | Edit | Delete |
| Private sector | Wal-mart | Community grants | $1,000 | $1,000 | Edit | Delete |
| State government | Dept. of Commerce | Housing Assistance Program (HAP) | $20,745 | $20,745 | Edit | Delete |
| Federal government | USDA Rural Development | Housing Preservation Grant | $75,000 | $75,000 | Edit | Delete |
| Non-profit | Presbyterian Church | One great hour of sharing | $5,000 | $5,000 | Edit | Delete |
| Private sector | Regional Banks | Community Development and Outreach (low-interest housing loans) | $600,000 | $600,000 | Edit | Delete |
| Non-profit | Housing Assistance Council | We Build | $15,000 | $30,000 | Edit | Delete |
| Local or regional government | Local and county government | Housing Operation | $50,000 | $50,000 | Edit | Delete |
| | | **Totals:** | **$1,066,745** | **$1,143,745** | | |
| | | | Help on Funding | | | |

## In-Kind and Assistance Section

| In-Kind and Technical Assistance | | | | | | |
|---|---|---|---|---|---|---|
| Sources/Partner/ Volunteers | Type of Contribution | Quantity | | | | |
| Habitat for Humanity | 20 volunteers for 8 Saturdays (160 days of assistance) | 160 | Edit | Delete | | |
| The ten homeowners selected for housing rehabilitation | Sweat Equity of 250 hours (10 homeowners for 250 hours) | 2500 | Edit | Delete | | |
| A real estate agent will provide a seminar to the ten potential home buyers on the process of purchasing a home | One free seminar for ten participants | 1 | Edit | Delete | | |
| A local financial planner is going to provide a free seminar on creating household budgets, keeping good credit, and ways to curb debt | one free seminar for ten people | 1 | Edit | Delete | | |
| Illinois State University | One construction planner gave 60 hours of his time | 60 | Edit | Delete | | |
| | | | Help on Assistance | | | |

## Secondary Outputs Section

| Secondary Outputs | | | | | |
|---|---|---|---|---|---|
| Training Housing Benchmark (Six Months Down the Road) EC - 1 | | | | | |
| Main | Tasks | Funding and Assistance | Secondary Outputs | View All | |
| **Category** | **Type of Activity** | **Output** | **Unit of Measurement** | | |
| Housing | Single Family | 3 | # of houses rehabilitated | Edit | Delete |
| Housing | Single Family | 3 | # of families served | Edit | Delete |
| | | Help on Secondary Outputs | | | |

## Notes Section

**Notes**

Three houses have been rehabilitated so far and construction on four houses has been completed. The cost of planning was reduced due to in-kind assistance from a construction planner from Illinois State University, his contribution is valued at $3000. Discussions with regional banks were successful and an agreement has been signed with the EC to provide low interest loans for this housing benchmark. The nonprofit organization Housing Assistance Council has provided $15,000 of the $30,000 requested, they stated that after progress reports are delivered for the first grant they will consider funding a second grant for $15,000. The housing subcommittee is considering a "We Are Halfway There Celebration" after the sixth house is constructed and the rehabilitation of the fifth house has been completed. Arrangements are being made with the local community center.

USDA

United States Department of Agriculture