UWMD Workshop:
Outcomes and Logic Models

CIG Application Workshop for FY 2012-2013

Overview

- Outcomes
  - Purpose
  - SMART
  - UWMD Format
  - Examples
- Logic Models
  - Purpose
  - Everyday Logic Models
  - Tips
  - Construction
  - Evaluation

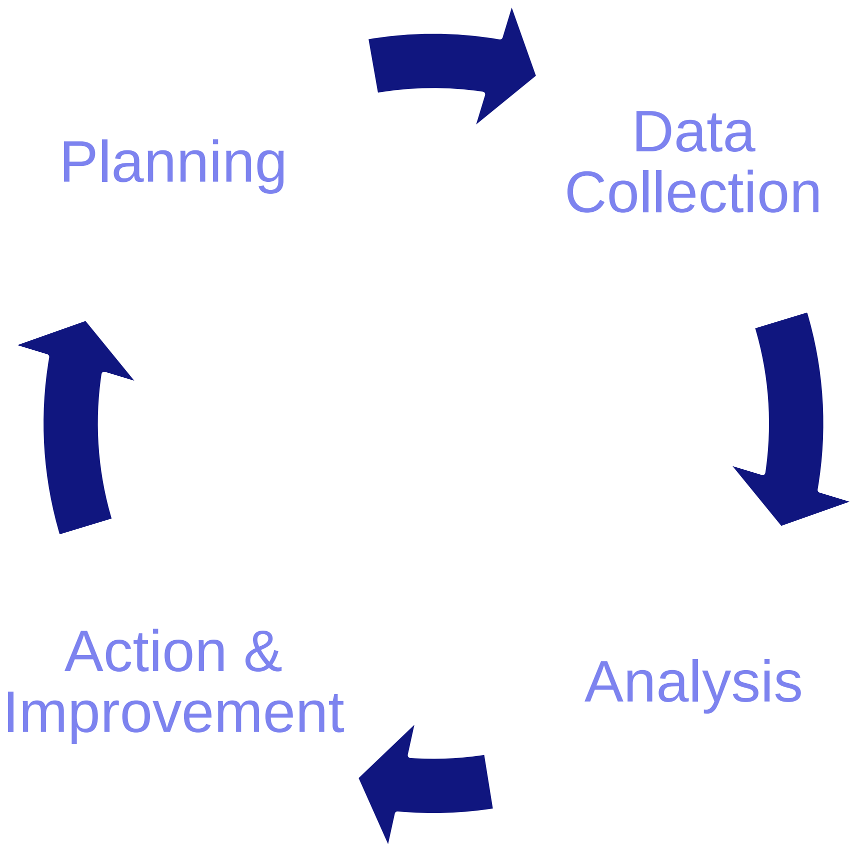
Outcomes

What is outcomes based planning and evaluation?

"Not how many worms the bird feeds its young, but how well the fledgling flies"

United Way of America, 2002

The importance of Evaluation and Outcome based programing



Outcomes: Purpose

- What is an Outcome?
  - Outcomes are benefits for participants during or after their involvement with a program.
  - Outcomes may relate to knowledge, skills, attitudes, values, behavior, condition, or status.
- Why are Outcomes necessary?
  - Outcomes provide feedback on how a program is doing, the program's effectiveness, and shine a light on potential areas for improvement.
  - Outcomes can also help identify potentially unintended results of programming.

Outcomes: Activity

- Create possible general outcomes for these programs:
  - What possible changes could occur as a result of:
    - Pregnant women attending a nutrition education program?
    - Individuals attending a financial education program?
    - Students being mentored afterschool?

Outcomes: Activity

- Create possible general outcomes for these programs:
  - What possible changes could occur as a result of:
    - Pregnant women attending a nutrition education program?
      - Women eating recommended numbers of serving from all food groups.
    - Individuals attending a financial education program?
      - Individuals increase knowledge of budgeting.
    - Students being mentored afterschool?
      - Students increase homework grades.

Outcomes: SMART

<u>Outcomes should be SMART:</u>

- **S**pecific
- **M**easurable
- **A**ction-oriented
- **R**ealistic
- **T**imed

Outcomes: SMART

- Language needs to be clear.
  - What do you mean by…
- United 2020 Goals = Community Wide Impact
- Program outcomes → Impact
- Objectives (client focused) = Outcomes
- Activities → Outputs
  - Outputs can list "tangible" accomplishments as a result of activities; products

Outcomes: SMART

- Program Narrative: Introduce your general goals here and describe how your outcomes will help the program reach those goals.
- Evaluation Sections:
  - Describe what evidence or best practices supports these outcomes.
  - Discuss how historical results influence the current outcomes, if it is new program discuss what you use in the absence of historical results to craft the outcomes.
- Logic Model: Ensure the logical progression is present to support the outcomes as realistic and appropriate.

Outcomes: The UWMD Format

- Know your audience:
  - Volunteers are trained to look for SMART outcomes first in the Program Narrative, then in the Evaluation Sections and finally the Logic Model.
  - Page 42 of the RFP discusses how to structure outcomes for the purposes of this proposal.
- Individual elements of evaluation need context, explain each within the evaluation narrative.
- Traps:
  - Assuming we know cause: symptoms vs. root causes.
  - The audience may not have the same level of understanding of the issue the program is tackling.

Outcomes: Examples

- **Most outcomes will be stated in this format:**
  - X% (number) of clients will improve by X% in a specific time frame.

Examples:

- 70% (175) of students will show a 10-point increase in at least one core subject area between the first semester report card and the final school year report card.
- 80% (300) of clients will improve their financial literacy score by 30% or more when comparing the pre-test to post-test results at the end of the financial education program.
- 75% (200) of pregnant women will enroll in prenatal services and attend 100% of their prenatal appointments remaining between enrollment and birth.

Logic Models

Logic Models

- A Logic Model is…

- A Logic Model is not…

Logic Models: Purpose

- What is a Logic Model?
  - It is an “If – Then” sequence of changes that the program intends to set in motion through its inputs, activities, and outputs.
  - A graphic representation of a program showing the intended relationships between investments and results.
- Why are Logic Models necessary?
  - Logic Models help to identify the key program components that must be tracked to assess the program’s effectiveness.
  - Logic Models illustrate the client’s progress through the program, and aid in developing a realistic picture of what the program can expect to accomplish.

Logic Models

<u>Outputs:</u>

•Direct products of program activities and usually are measured in terms of volume of work accomplished

•Think in units (ie. Time, people, things)

<u>Outcomes:</u>

•Benefits or changes for individuals or populations during of after participating in your program

•What participants know, think, or can do, how behavior changes, or what is different

An Everyday Logic Model

Resources:
Family Members, Budget, Car, Camping Equipment

Activities/Outputs:
Drive to the state park; set up camp; cook, play, laugh, hike, talk

Outcomes:
Family members learn more about each other; family bonds; family wants to spend more time together.

An Everyday Logic Model
Now you create one…

Resources:
What will you need? Who is involved?

Activities/Outputs:
What will be done? What is created?

Outcomes:
What is accomplished? What change occurs?

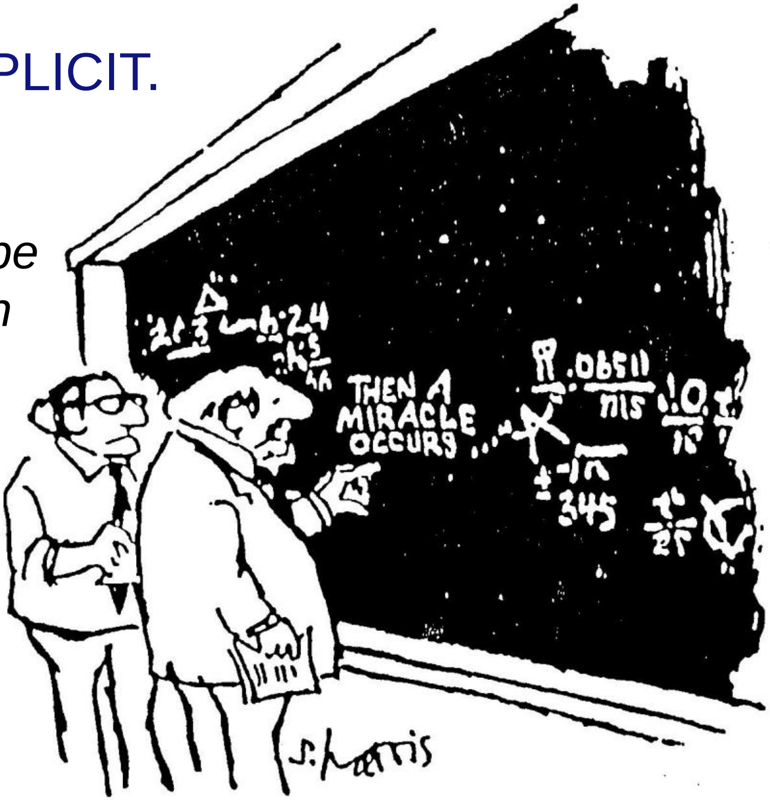
Logic Models: Tips

A common problem is that activities and strategies often do not lead to the desired outcomes.

Check your 'if-then' statements and ensure that they make sense and lead to the outcomes you want to achieve.

A logic model makes the connections EXPLICIT.

"I think you should be more explicit here in Step Two."



Logic Model: Tips

- Developing a Logic Model is a group process, you may want to include any of the following people in the process;
  - Staff and volunteers, fund providers, administrators, board members, clients, or a content expert.
- Start at the end, identify the long term outcomes and goals.
- Avoid the pitfalls of Logic Models that are too long or too vague.
- Set boundaries for your Logic Models, maintain focus.
- Keep the Evaluation Tool nearby when developing all aspects of the proposal, pages 57-59 of the RFP.
- Remember to print Logic Models as a Diagram.

Logic Model: Construction

- Defining the Situation:
  - Identify the appropriate outcome(s) for your program and the impact area and strategy panel it aligns to.
  - Review research, evidence, knowledge-base
- Inventory:
  - List all activities that are part of the outcome process, then prioritize which ones are essential to the “if-then” relationship.
  - List the outputs that are numerical byproducts of the activities.

Logic Model: Construction

- Gather Resources:
  - Identify all inputs that make the activities possible.
  - List all the “what” and “who” that is necessary to delivering the activities.
- Satisfaction:
  - Satisfaction is not an outcome because being “satisfied” with something doesn’t mean that someone has changed or improved. Participants may be satisfied with the program, or like you as a person, or want to come again, but such reactions do not indicate that they have changed or benefited in any way.
- Read for clarity, focus, and logic.

Logic Model: Evaluation

- Logic Models provide the program description that guides the evaluation process
  - Helps the audience match evaluation to the program
  - Helps organizations to know what and when to measure
  - Helps focus on key, important information:
    - Organizations: prioritize, where will we spend the organization's evaluation resources?
    - Audience: What do we really need to know?

Logic Model: Evaluation

A four point checklist for assessing the Logic Model:

1. Meaningful: It is worth doing and adds value.
   - Best Investment
2. Plausible: It makes sense
   - The need for this program and the research to support it is described in the Program Narrative.
3. Doable: It can be carried out.
   - The resources and activities align with the program plan.
4. Testable: It can be verified.
   - The outputs and outcomes align with the Evaluation Plan.

Logic Models: Evaluation

- Is the information on the attached logic model consistent with the information presented in the overall proposal? Specifically:
  - Does the information on the logic model under "Resources" and "Activities" align with information presented in the Program Plan?
  - Do outputs and outcomes listed on the logic model align with information presented in the Evaluation Narrative?
  - Is it clear which outcome(s) will be reported to United Way at the end of the 2012-2013 funding cycle?

(0 - Not at all, 1 - Not Adequately, 2 - To Some Extent, 3 – To a Good Extent, 4 - Completely)

Questions on Logic Models?

UWMD Workshop: Site Visits

CIG Application Workshop for FY 2012-2013

Contents

- Purpose
- Scheduling
- Structure
- Attendance
- Content Options
- Presentation Options
- Evaluation
- Common Questions

Purpose of Site Visits

- High level overview of program
- Offer a fuller understanding of the program

  Examples: meet program staff, context for services
- Share the program experience

  Example: client testimonies, audio/visual
- Provide updated information

  Examples: updated program results, new partnerships
- Clarify issues of concern

Scheduling Site Visits

- Site Visits are awarded at the conclusion of Initial Panel Meetings, held in early February 2011.
- UWMD staff will coordinate with organization staff to schedule each Site Visit.
- All Site Visits will be conducted between February 20th and May 5th, depending on the Panel.
- Refer to page 54 of RFP for Site Visit schedule for each Panel.
  - All time conflicts must either be communicated in the grant proposal or to Rosemary Grougnet (rgrougnet@unitedwaydallas.org) no later than 1/1/12.

Scheduling Site Visits

- Travel time between Site Visits will be <u>increased</u> in order to ensure Panelists are on-time to each Site Visit.
- In the event that the Panel is behind schedule, UWMD staff will notify each affected agency.

Tip: Block out all possible Site Visits dates and times now to ensure that unexpected conflicts do not arise!

Tip: Be prepared to start at the scheduled time unless otherwise informed by UWMD staff.

Scheduling Site Visits

Tip: Be sure the program contact person listed on the summary form is available in case they need to be contacted on the day of the Site Visit.

Tip: After a Site Visit has been awarded, please provide directions, parking instructions, and any other relevant travel information so that UWMD staff can plan for appropriate travel time between visits.

Structure of Site Visits

- Each program will have 45 minutes to conduct the Site Visit.
  - 25 minutes is reserved for the Site Visit presentation.
  - 20 minutes is reserved for volunteer Question and Answer time.
- If the Panel does not use the full 20 minutes of Q & A, the Panel Chair will give that time back to the organization to use at their discretion.
- **Tip**: Be mindful of the 25-minute presentation limit. The Panel Chair and Vice-Chair are instructed to begin Q & A after 25 minutes, regardless of whether or not the presentation has concluded.

Site Visit Attendance

Recommended Attendees/Presenters:

- Executive Director
- Program Staff
- Finance Staff
- Grant Writer

Optional Attendees/Presenters:

- Board Volunteers
- Program Volunteers
- Program Clients
- Community Partners

Site Visit Attendance

Strategy Panel:

- Volunteer Leadership (Chair and Vice-Chair)
- 10-16 Community Volunteers

UWMD Staff

- Grants Specialist
- Staff Liaison

- At least half of the Volunteers on the Strategy Panel must attend the program's Site Visit.
- If fewer than 50% of Panel Volunteers attend the site visit, Organizations have the option to reschedule.

Site Visit Attendance

Tip: Plan to accommodate at least 20 individuals at your Site Visit.

Tip: Prior to the Visit, you may request a list of Panel Volunteers from your grants specialist. This will help speed up sign-in and name tag processes.

Site Visit Presentation Content Options

<u>Grant Proposal Overview</u>

- Agency Services
- Staff Introductions
- Program Plan
- Alignment between Agency and Program Goals
- Alignment between Program and Panel Goals
- Evaluation, Measurement, Best Practices
- Outcomes Review

Site Visit Presentation Content Options

Program Experience

- Testimonials
  - Staff
  - Clients
  - Volunteers
  - Collaborators
- Observation of Services
- Facilities Tour
- Activities

Site Visit Presentation Options

- Video / PowerPoint
  - Pros: time management, clarity, focus, content
  - Cons: less interactive, overly scripted, information overload
  - **Tip**: keep concise, supplement with other presentation options, and make sure it is queued up and ready!!
  - **Tip**: flowcharts help convey complex processes

- Client Testimonial
  - Pros: human interest, program experience
  - Cons: unpredictable, time management, focus
  - **Tip**: choose clients wisely, rehearse

Site Visit Presentation Options

- Role-Playing Exercise / Interactive Demonstration
  - Pros: program experience, staff communication, creativity
  - Cons: preparation, time management, clarity
  - **Tip**: most effective when illustrating important program processes

- Facilities Tour / View Program Activities
  - Pros: program experience, context of service delivery
  - Cons: time management, communication challenges
  - **Tip**: keep short, focused, and break Panel up into smaller groups if presenting information; avoid Q&A when group is divided

Site Visit Presentation Options

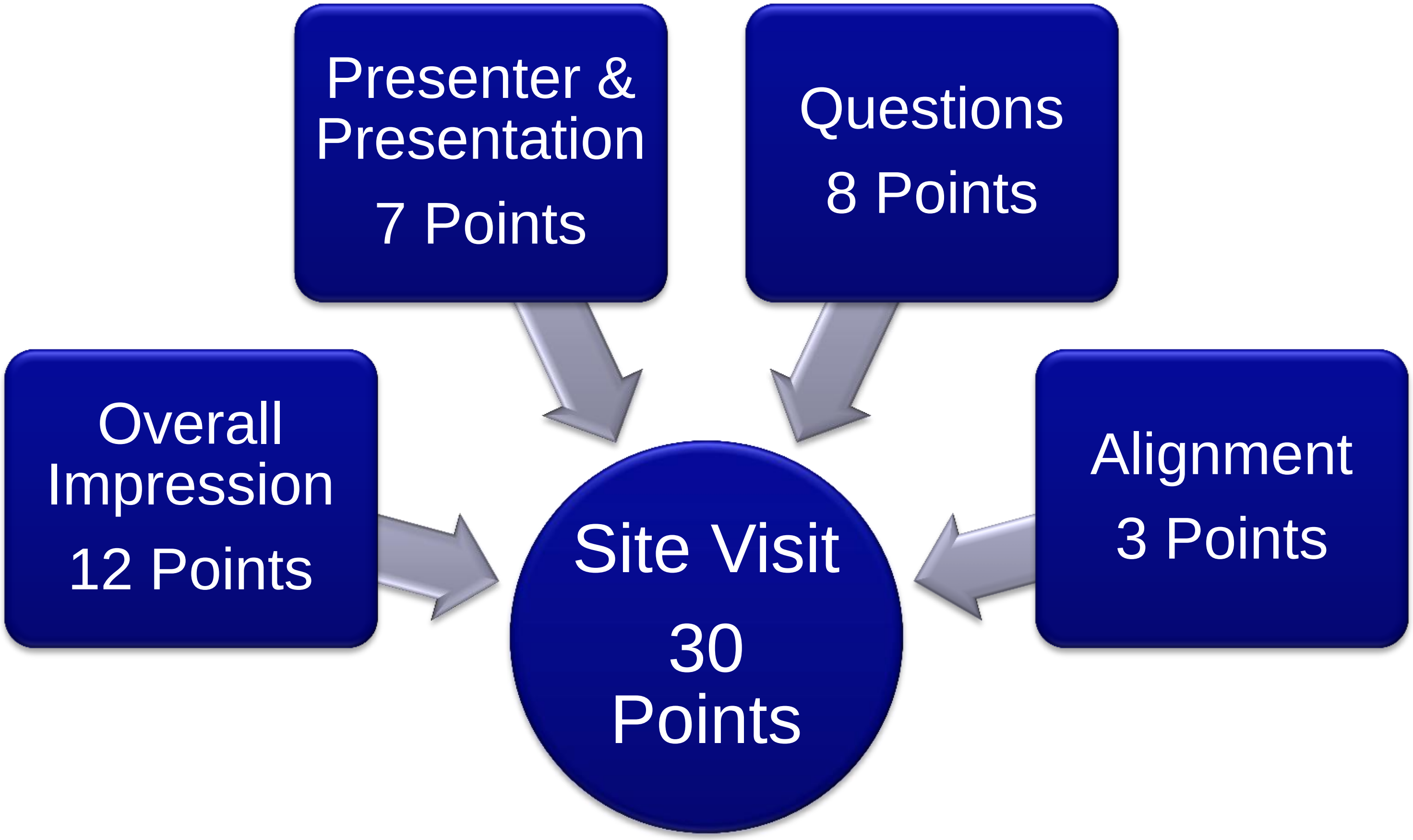
- Staff/Volunteer/Board/Collaborator Perspectives
  - Pros: program experience, staff communication, expertise
  - Cons: time management, focus (volunteer, collaborator)
  - **Tip**: keep focused and organized, choose wisely, rehearse!

- Handouts
  - Pros: numbers, key information, reference point
  - Cons: information overload, distracting
  - **Tip**: use in supporting role as a reference point; don't provide unless you want the Panelists to read them during the presentation

Site Visit Evaluation

- Each Site Visit can receive a maximum of 30 points.
- Panel Volunteers and UWMD staff will evaluate and score each site visit using the Site Visit Evaluation Tool (pg. 60 in RFP)
- Only those Volunteers and UWMD staff in attendance at the Site Visit will be allowed to score the Site Visit.

Site Visit Evaluation



Site Visit Evaluation Questions

1. How prepared was the Organization? Did the Organization manage their time well? (3 points)
2. Was information relevant and presented clearly? Did the agency stay on topic? (4 points)
3. Did the information presented during the Site Visit align with the information presented in the proposal? (3 points)
4. Were all the panel’s questions sufficiently answered? (8 points)
5. Does the Organization appear to have the infrastructure and staff resources necessary to accomplish what is proposed in the request? (4 points)
6. Do you feel this program meets Best Investment criteria? (8 points)

Q&A: Common Questions

- How is the program marketed to the public and/or or target population?
- How has the demand for program services changed over the last few years? How has the program accommodated such changes?
- Have any new collaborations been forged since the submission of the grant? Do you anticipate the addition of collaborative partners in the coming months?
- What changes have been made to the program in the past year?

Q&A: Common Questions

- Is this the only location where program activities are being conducted?
- What happens when clients are unable to access program services? What happens to those on your waitlist?
- Have any aspects of the program changed since the submission of the grant?
- What has been the greatest challenge with administering this program? How has your organization responded?
- What contingency plans are in place in the event that the program is not awarded United Way funding in full or in-part?

Q&A: Common Questions

- Why is the program evaluated in the way that it is?
- How were outcome targets chosen, and why are they impactful?
- Has new program data been collected since the submission of the proposal? Are you currently on track to meet or exceed proposed outcome targets?
- What follow-up or feedback procedures are utilized to track clients in the medium and long-term?

Questions?