Evaluation Use in Philanthropy

Using Logic Models

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So, what is a logic model anyway?

A Logic Model is a simple description of how a Grantmaker or Grantee program is understood to work to achieve outcomes for participants.

Logic Models Can . . .

- be useful for initial Grantmaker or Grantee program conception, planning, evaluation and fund development
- help build consensus on a Grantmaker or Grantee program design and operation
- show how Grantmaker or Grantee programs are working or could work
- help develop a realistic picture of what can be accomplished

Logic Model and Theory of Change What's the Difference?

A Logic Model is a widely used tool that presents specific details of program inputs, activities and outcomes, and shows generally how they are related.

Theory of Change is a model designed to link outcomes and activities to explain how and why desired change is expected to come about.

Essentially, Logic Models clarify what you are doing and Theories of Change clarify why you are doing it.

The terms are sometimes used inter-changeably but they are actually different tools.

A Theory of Change . . .

- is generally more useful for a whole organization or collection of programs or strategies within a department (or initiative)
- is a causal model that shows underlying assumptions and clarifies necessary pre-conditions that must be met before long-term outcomes can be achieved
- often includes descriptions of internal and external context

Adapted from Steven LaFrance, 2009

To Develop a Logic Model You Must Describe:

- **Inputs**: resources, money, staff/time, facilities, etc.
- **Activities**: how a program uses inputs to fulfill its mission – the specific strategies, service delivery
- **Outputs*:*** tangible, direct products of program activities
- **Outcomes:** changes to individuals or populations during or after participation
- **Indicators**: Indicators are specific characteristics or changes that represent achievement of an outcome.
- **Targets**: specify the amount or level of outcome attainment that is expected, hoped for or required: can be embedded in outcome or indicator statements

Inputs	Activities	Outputs	Outcomes	Indicators

Logic Models Can Incorporate Context and Assumptions

Ask yourself….

…do the outcomes seem reasonable given the program activities?

…do the assumptions resonate with me and my experiences?

…are there gaps in the strategy?

Contextual Analysis

Identify the major conditions and reasons for why you are

doing or could do this work

Assumptions

What is needed to address the context that exists?

What would be interesting to try?

What do we need to respond to this RFP?

Inputs: What resources do we need, can we dedicate, or do we currently use for this project?

Activities: What can or do we do with these inputs to fufill the program mission?

Short-term Outcomes:
What benefits for participants during and after the program can we or do we expect?

New knowledge?
Increased skills?
Changed attitudes?
Modified behavior?
Improved condition?
Altered status?

Assumptions

When do we think outcomes will happen – will what happens initially affect or cause other longer-term outcomes?

How does this fit into our outcome desires overall?

Longer-term Outcomes:

What do we think happens ultimately?

How does or can this contribute to organizational and community value?

Developing a Logic Model: Advice

- When used for program planning, start with outcomes and then determine what activities will be appropriate and what inputs are needed.
- There are multiple formats for logic models. There are no best or right versions.
- The relationships between inputs, activities and outcomes are not one-to-one, but
  - activities must be sufficient in number, duration and intensity to contribute significantly to the outcomes
  - and inputs must be sufficient (in both quantity and quality) to support all activities

Important Things to Remember About Developing Logic Models

- ★ Not all Grantmaker or Grantee programs lend themselves easily to summarization in the logic model format.
- ★ Logic models are best used in conjunction with other descriptive information or as part of a conversation.
- ★ It is advisable to have one or two key program staff initially summarize the logic model, before multiple stakeholders review it and agree upon what is included and how.

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What is the difference between outcomes, indicators and targets?

	OUTCOMES	**INDICATORS**	**TARGETS**
Definition	Outcomes are changes in behavior, skills, knowledge, attitudes, condition or status.	Indicators are specific, measurable characteristics or changes that represent achievement of an outcome.	Targets specify the amount or level of outcome attainment that is expected, hoped for or required.
Characteristics	Outcomes are related to the core business of the program, are realistic and attainable, within the program's sphere of influence, and appropriate. Outcomes are what a program is held accountable for.	Indicators are directly related to the outcome and help define it. Indicators are specific, measurable, observable, can be seen, heard or read, and make sense in relation to the outcome whose achievement they signal.	Targets or levels of outcome attainment can be determined relative to external standards (**when they are available**) OR internal agreement (based on best professional hunches, past performance, or similar programs).
Issues/Cautions	• Outcomes are very time-sensitive. When you measure influences what you get. • The more immediate an outcome, the more influence a program generally has on its achievement. • The type and magnitude of outcomes are closely related to program design. There is usually more than one way to get an outcome. Similarly, changes in program design often lead to changes in outcomes. • Positive outcomes are not always improvements. Sometimes they are the absences of something negative; sometimes they are achievement of a standard or milestone.	• May not capture all aspects of an outcome. • Don't exclude an indicator because it seems too simple. • Many outcomes have more than one indicator. Identify the set that you believe (or have agreed) adequately and accurately signals achievement of an outcome. Acquire agreement from key stakeholders, in advance, regarding the set and the "level" required to indicate positive outcomes. • If you are trying to measure prevention of negative events, consider identifying meaningful segments of time to follow-up and determine whether the event happened.	• Performance targets should be specified with program (and evaluation) design. The specification process must define what is highly effective, adequate, not adequate. Be sure there is buy-in regarding what constitutes a positive outcome. • Lacking data on past performance it may be advisable to wait until baseline data have been obtained. • Be especially cautious about wording numerical targets so they are not over or under ambitious, and so they make sense to key stakeholders or information users. • If the goal statement indicates change in magnitude (i.e., increases or decreases), be sure to specify the initial levels and what is considered positive. • Be sure goal statements are in sync with meaningful program time frames.

Logic Model Assessment

To determine whether your logic model should work, answer the following important questions. If possible, involve stakeholders in the process of reviewing and assessing your logic model.

1. Does the logic model:

- clearly distinguish between activities and outcomes and where appropriate, between initial, and longer-term outcomes?
- clearly communicate what is to be done and how it is expected to help participants?
- seem logical?
- include all the inputs, activities, outputs and outcomes that are important?
- suggest appropriate connections between inputs, activities and outcomes?

2a. Are the outcomes identified:

- those for which the program should be held accountable?
- represent meaningful change for participants?
- useful to program managers to identify program strengths and weaknesses?
- likely to be accepted as valid outcomes of the program by program managers and other stakeholders?

2b. Is it reasonable to expect that the program can influence the outcomes in a non-trivial way? If there are targets, do they seem realistic?

3a. Are the activities:

- sufficient in number, duration and intensity to contribute significantly to the outcomes?
- doable given project inputs?

3b. Are there activities that seem unrelated to the outcomes, or does it seem likely that some important activities are missing?

4. Do the inputs seem sufficient (in both quantity and quality) to support all activities?

Program Logic Model: As a Planning Tool

Program: _____ Mission:

Inputs	Activities	Outputs	Outcomes

Adapted from United Way of America

Extended Program Logic Model

Program: _____ Mission:

Outcomes	Indicators/Targets	Data Sources

Adapted from United Way of America

ROCHESTER AREA LOGIC MODEL

Program/Project: Community Healthcare Coordination for Older Adults with Developmental Disabilities
Agency: Lifespan of Greater Rochester Inc. Date: 12/08/2009
Program/Project Time frame: April 1, 2010-March 31, 2012
Program/Project Goal: To increase access to healthcare services and knowledge of health issues for older adults with developmental disabilities.
Names & titles of those with key roles in developing logic model: Jennifer Helmbold, Program Director, Jody Rowe Associate VP

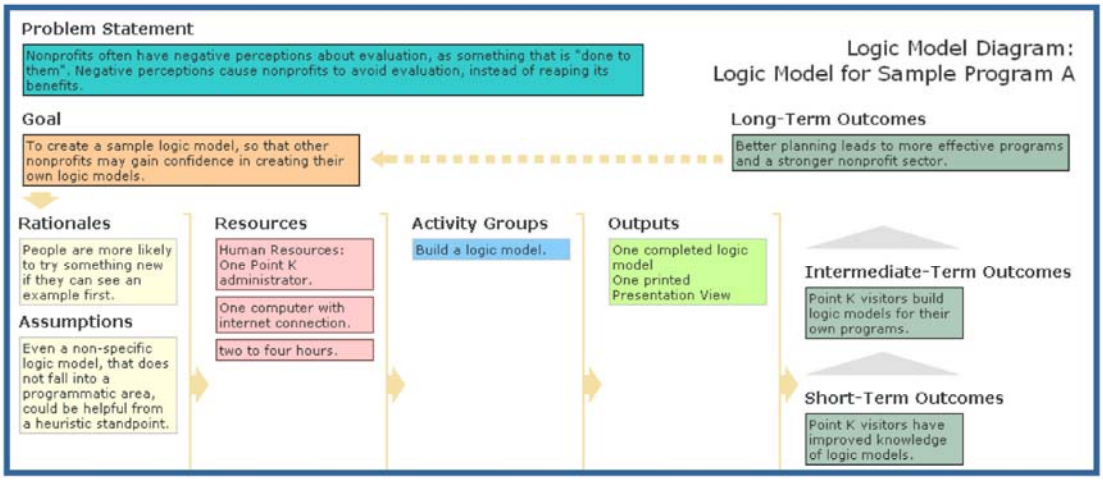
Inputs	Activities	Projected Outcomes	
		Shorter-term Outcomes Place a "*" next to those to be measured	Longer-term Outcomes Place a "*" next to those to be measured
1 FTE Healthcare Coordinator (LPN) .5 FTE Healthcare Coordinator .10 FTE Administrator 50 consumers Transportation services Training curriculum Office space & equipment for staff $ 65,000/year	Coordinate 60 healthcare appointments/25 consumers ea./5hrs/wk for 24 months Accompany 25 consumers to healthcare appointments 4 hrs. ea./mo. for 24 months Coordinate transportation services/25 consumers ea./2hrs/wk for 24 months Document outcomes of healthcare appointments/25 consumers ea./1hr/wk for 24 months Develop training curriculum 2hrs/wk for 3 months Conduct 2 health educational seminars/50 consumers and caregivers ea./2hrs for 2 months Conduct 1 health educational seminars/6 service coordinators/2hrs for 1 month	*Increase skills necessary to manage healthcare needs *Increase knowledge of aging & health-related issues * Increase adherence to medical treatment plans Increase identification of undiagnosed illness and disease Increase ability to self-advocate in healthcare environment Increase successful completion of medical appointments	*Improve health of older adults with developmental disabilities *Ability to age in their home environment Reduce premature admission into long-term care facilities Reduce need for medication treatments Increase control and management of chronic illness and disease Improve quality of life of older adults with developmental disabilities

Outcomes, Indicators, Targets, Timeline for CHC Project

Outcomes	Indicators/Measures	Targets/Performance Standards/Projected levels of success	By when will targets be achieved?
Improved overall health	Successful completion of healthcare appointments Successful medication management	75% of consumers will improve their successful completion of healthcare appointments 75% of consumers will improve their accuracy in taking medication	**04/01/2012**
Increase skills necessary to manage healthcare needs	Consumers will learn to coordinate healthcare appointments. Consumers will learn medical self-advocacy skills. Decrease # of hospital emergency room visits	50% of consumers will coordinate healthcare appointments 50% of consumers will self-advocate during medical appointments 65% reduction in hospital emergency room usage	**04/01/2012**
Increase in knowledge of aging & health- related issues	Complete health education seminar	50% of consumers will successfully self-advocate during medical appointments	**04/01/2011**
Increase ability to age in home environment	Decrease # of long-term nursing home admissions	80% of consumers will divert nursing home placement for one year	**04/01/2012**
Increase adherence to medical treatment plans	Complete medical appointments & specialized testing	75% of consumers will follow through with medical treatment plans 75% of consumers will successfully complete appointments	**04/01/2012**

innovation network
TRANSFORMING EVALUATION FOR SOCIAL CHANGE

Logic Model Workbook



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TRANSFORMING EVALUATION FOR SOCIAL CHANGE

Logic Model Workbook

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Introduction - How to Use this Workbook

Welcome to Innovation Network's *Logic Model Workbook*. A logic model is a commonly-used tool to clarify and depict a program within an organization. It serves as a foundation for program planning and evaluation.

This workbook is a do-it-yourself guide to the concepts and use of the logic model. It describes the steps necessary for you to create logic models for your own programs. This process may take anywhere from an hour to several hours or even days, depending on the complexity of the program.

We hope you will use this workbook in the way that works best for you:

- As a stand-alone guide to help create a logic model for a program in an organization,
- As an additional resource for users of the Point K Learning Center, and/or
- As a supplement to a logic model training conducted by Innovation Network.

You can create your logic model online using the **Logic Model Builder** in Innovation Network's **Point K Learning Center**, our suite of online planning and evaluation tools and resources at www.innonet.org. This online tool walks you through the logic model development process; allows you to save your work and come back to it later; share work with colleagues to review and critique; and print your logic model in an attractive, one-page presentation view for sharing with stakeholders.

For those of you who prefer to work on paper, a **logic model template** is located in Appendix A of this workbook. You may want to make several copies of this template, to allow for adjustments and updates to your logic model over time.

 This checklist icon appears at points in the workbook at which you should record something – either write something in your template, or enter it into your online Logic Model Builder.

In preparing to create a logic model, you may want to consider:

What stakeholders should I involve?
The development of a logic model offers an opportunity to engage your program's stakeholders in a discussion about the program. Stakeholders might include program staff, clients, partners, funders, board members, community representatives, and volunteers. Their perspectives can enrich your program logic model by clarifying expectations for the program.

How can I use a logic model to support my program over time?
A program's logic model is not static. You can, and should, change the model over time as the program unfolds.

What is the scope of this logic model?

- Identify a **timeframe** for the logic model you are about to create. It will help you frame short-, intermediate, and long-term outcomes and make better decisions about resources and activities. Many groups design logic models for a funding or program cycle, a fiscal year, or a timeframe in which they believe they can achieve some meaningful results.

- This logic model structure is intended for **program** planning. Define the parameters of your program clearly. If your organization is small and only has one program, you can also use this structure for small-scale strategic planning.

Developing a Logic Model

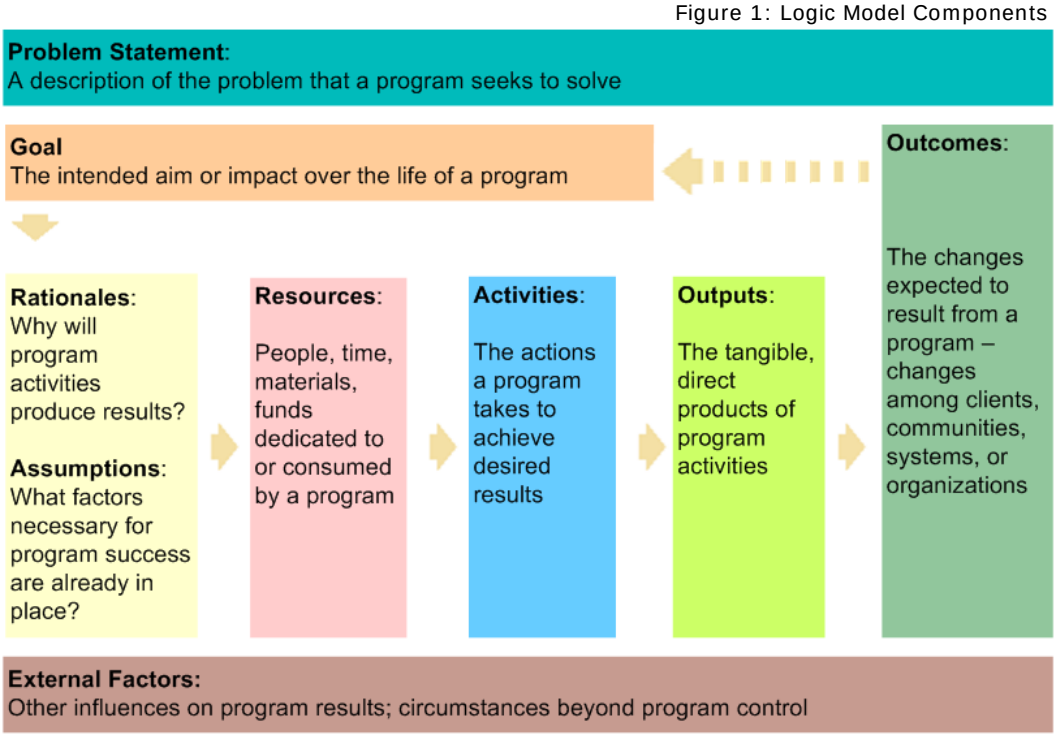
Many different logic model formats exist, but they all contain the same core concepts. The format we use in this workbook and in our online tools has proven useful and manageable for the nonprofit partners we have worked with, and is the result of more than thirteen years of program planning and evaluation experience in the field.

It's not necessary to create your logic model all in one sitting. It will almost certainly be useful to talk to other program stakeholders and get their input along the way. You can work through the process as we have it laid out here – starting with the problem your program is meant to solve, and ending with your intended outcomes – or, if it's easier for you, you can work in reverse, starting with Outcomes and working your way back.

Similarly, the names of key components may also vary among different logic models used in the field, but the underlying concepts are the same. In this workbook, we identify other terms used in the field for similar concepts – you'll see these other terms marked with this symbol: . As you develop your logic model, we encourage you to find a common language to use among key stakeholders, whether that language reflects the terms used here or elsewhere.

The components of the logic model used by Innovation Network are:

Figure 1: Logic Model Components



A series of "if-then" relationships connect the components of the logic model: **if** resources are available to the program, **then** program activities can be implemented; **if** program activities are implemented successfully, **then** certain outputs and outcomes can be expected.

As you draft each component of the logic model, consider the if-then relationship between the components. If you cannot make a connection between each component of the logic model, you should identify the gaps and adjust your work. This may mean revising some of your activities to ensure that you are able to achieve your outcomes, or revising intended outcomes to be feasible with available resources.

Purposes of a Logic Model

The logic model is a versatile tool that can support many management activities, such as:

- **Program Planning**. The logic model is a valuable tool for program planning and development. The logic model structure helps you think through your program strategy—to help clarify where you are and where you want to be.

- **Program Management**. Because it "connects the dots" between resources, activities, and outcomes, a logic model can be the basis for developing a more detailed management plan. Using data collection and an evaluation plan, the logic model helps you track and monitor operations to better manage results. It can serve as the foundation for creating budgets and work plans.

- **Communication**. A well-built logic model is a powerful communications tool. It can show stakeholders at a glance what a program is doing (activities) and what it is achieving (outcomes), emphasizing the link between the two.

- **Consensus-Building**. Developing a logic model builds common understanding and promotes buy-in among both internal and external stakeholders about what a program is, how it works, and what it is trying to achieve.

- **Fundraising**. A sound logic model demonstrates to funders that you have purposefully identified what your program will do, what it hopes to achieve, and what resources you will need to accomplish your work. It can also help structure and streamline grant writing.

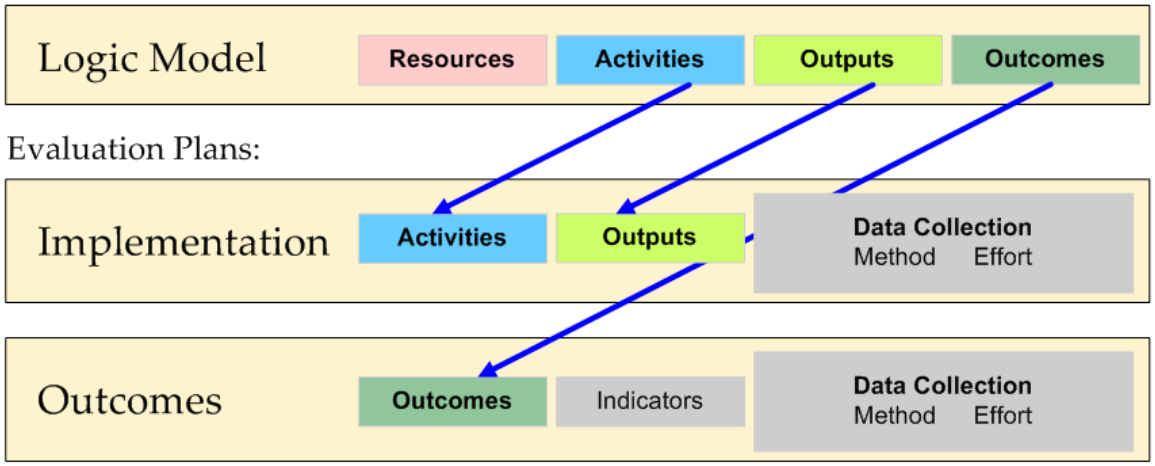
The logic model you create with this workbook can be used for any or all of the above purposes – any time you need to show or refer to a clear and succinct picture of your program.

The Logic Model's Role in Evaluation

The cornerstone of effective evaluation is a thorough understanding of a program: what resources it has to work with, what it is doing, what it hopes to achieve, for whom, and when. In conducting an evaluation, it is tempting to focus most of your attention on data collection. However, your evaluation efforts will be more effective if you start with a logic model. Going through the logic model process will help ensure that your evaluation will yield relevant, useful information.

The figure below illustrates how the logic model you will build can serve as the foundation for future evaluation plans. (Our *Evaluation Plan Workbook* and online Evaluation Plan Builder offer guidance for creating evaluation plans.)

Figure 2: Connections between Logic Model and Evaluation Planning



Components – Step by Step

Problem Statement

Other Terms for "Problem Statement"

You might also hear a problem statement called an "issue statement" or "situation."

Programs are created to address particular problems or needs. The first step in creating a logic model for a program is to state the problem that frames a particular challenge for the population your program will serve.

Your problem statement should briefly explain what needs to change: why is there is a need for intervention? Your problem statement answers the question, "What community problem does my program solve?" Include "*who, what, why, where, when*, and *how*" in your statement.

Sample problem statements:

> *"A growing number of women in Highland Falls lack the confidence and know-how to obtain employment and be self-sufficient."*
>
> *"In Townsville, low-income residents with bad or no credit do not have resources available to help them improve their current living situations."*

Build Your Logic Model: When you have identified your problem statement, insert it into the Problem Statement box in your logic model template, or on the "Problem/Goals" tab of the online Logic Model Builder.

Goal

Other Terms for "Goal"

You might also hear a goal called an "objective" or a "long-term outcome."

Next, think about the overall purpose of your program. What are you trying to accomplish over the life of the program? The answer to this question is the solution to your problem statement, and will serve as your program goal.

Goals serve as a frame for all elements of the logic model that follow. They reflect organizational priorities and help you steer a clear direction for future action.

Goals should:

- Include the intended results—in general terms—of the program or initiative.
- Specify the target population you intend to serve.

Examples of goal statements include:

> *Significantly increase the literacy rates among children with reading difficulties at George Washington Elementary School by implementing a teen-tutored reading program*
>
> *Assist clients in their effort to become economically self-sufficient*
>
> *Improve the health status of children in Harrison County, ages birth to 8 years*
>
> *Improve enforcement of the workplace and organizing rights of low-wage, contingent, and immigrant workers in our state through litigation and educational outreach*
>
> *Increase long-term and meaningful civic participation among students in grades 9 – 12 in the tri-county area*

Goal Tips:

- All programmatic components should be connected to your goal. Having a clear goal helps fight the temptation to implement an interesting program that doesn't really "fit."
- Phrase your goal in terms of the change you want to achieve over the life of your program, rather than a summary of the services you are going to provide.
- **Don't** make your statement so broad and general that it provides no guidance for your program.

Build Your Logic Model: Insert your goal statement(s) into the Goal box in your logic model template, or on the "Problem/Goals" tab of the online Logic Model Builder.

Resources

Other Terms for "Resources"

You might also hear resources called "inputs" or "program investments."

Identify the available resources for your program. This helps you determine the extent to which you will be able to implement the program and achieve your intended goals and outcomes.

List the resources that you **currently have** to support your program. (If you intend to raise additional resources for the program during this program timeframe, account for them under "Activities.")

An exception: If you're building your logic model as part of a proposal or to justify a funding request, list **all** the resources you will need for a successful program, whether or not you have them in hand. (You may wish to separate resources under headings for "need" and "have.")

Common types of resources include:

- **Human resources**: Full- and part-time staff, consultants (e.g., fundraising, technical support, strategic planning, communications), pro bono staff services, and volunteers
- **Financial resources:** Restricted grants, operating budget, and other monetary resources
- **Space**: Office and other facilities
- **Technology**: Computer hardware & software, communications infrastructure (email, website)
- **Other Equipment**: Office machinery (printers, copiers) and equipment specific to the program
- **Materials/Other**: Office supplies, program materials (training materials), insurance, etc.

Resource Tips:

- Identify the major resource categories for your program.
- Be as specific as you can about these resources, but do not spend a lot of time developing a detailed list of all actual or anticipated program expenditures.

Not specific enough	Just right	Too specific
Staff	3 full-time staff 1 part-time	3 FT staff @ 30 hrs/wk 1 PT staff @ 20 hrs/wk
Supplies	Art Supplies	25 paintbrushes 50 bottles of paint Soap

- Remember to include resources such as technology, materials, and space: these are often overlooked at the program planning stage, which can cause trouble later.
- You can use your resource list as the foundation for developing a program budget.
- Do you receive in-kind contributions? List those among your resources.

Build Your Logic Model: List your resources statement(s) in the Resources box in your logic model template, or on the "Timeframe/Resources" tab of the online Logic Model Builder.

Activities

Other Terms for "Activities"

You might also hear activities called "processes," "strategies," "methods," or "action steps."

Activities are the actions that are needed to implement your program—what you will do with program resources in order to achieve program outcomes and, ultimately, your goal(s).

Common activities are:

- Developing products (e.g., promotional materials and educational curricula),
- Providing services (e.g., education and training, counseling or health screening),
- Engaging in policy advocacy (e.g., issuing policy statements, conducting public testimony), or
- Building infrastructure (e.g., strengthening governance and management structures, relationships, and capacity).

It is often helpful to group related activities together. The number of activity groups depends on your program's size and how you administer it. For a large program, there might be numerous activity groups; smaller programs may consist of just one or two.

Examples:

A program with the goal of reducing the teen pregnancy rate in its city might have the following activity groups: family planning education, mentoring, and providing individual and group counseling. Each of these would have associated activities – a listing of the things you do to support those aspects of the program.

A program with a goal of increasing organizational capacity through strategic use of technology might have the following activity categories: technology planning, selecting and implementing technology infrastructure, staff assessment and training, and network support.

Activities Tips:

- You can use the activities you identify here as an outline for a work plan. Use the activities as headings in a more comprehensive work plan that includes staff assignments and a timeline.
- Providing a complete list of activities helps people who are not familiar with your understand what it really takes to implement it.

Figure 3: Activity Group Do's and Don'ts

Activity Group: Mentor Training	
ACTIVITIES: • Hire trainer • Conduct training	This set of activities is not detailed enough. It omits a number of key steps needed to implement mentor training.
Activity Group: Mentor Training	
ACTIVITIES: • Conduct Google search • Interview best practice program staff • Hire curriculum writer • Write first draft of material • Send material to 6 reviewers • Compile responses • Set up review meeting • Edit curricular material • Copy curricular material • Contact different training spaces • Fill out applications for space • Buy snacks • Arrange for markers and flip charts • Obtain men's and ladies room keys	This is too detailed. It would more appropriately belong in a work plan.
Activity Group: Mentor Training	
ACTIVITIES: • Research best practices • Develop curriculum • Prepare materials • Arrange logistics • Select trainer • Conduct training • Develop & implement feedback survey	This is just about the right level of detail for a logic model.

Build Your Logic Model: List all activities required to implement your program, and group related activities together. Record them in your template or on the "Activities/Outputs" tab of the online Logic Model Builder.

Other Terms for "Outputs"

You might also hear outputs called "deliverables," "units of service," or "products."

Outputs

Outputs are the measurable, tangible, and direct products or results of program activities. They lead to desired outcomes—benefits for participants, families, communities, or organizations—but are not themselves the changes you expect the program will produce. They do help you assess how well you are implementing the program.

Whenever possible, express outputs in terms of the size and/or scope of services and products delivered or produced by the program. They frequently include **quantities** or reflect the existence of something new.

Examples of program outputs include **numbers and descriptions** of:

- Classes taught or meetings held
- Materials developed or distributed
- Participants served
- Hours of service provided
- Partnerships or coalitions formed
- Focus groups held
- Policy briefings conducted
- Lobbying sessions with public officials held
- Curriculum/curricula developed

An output statement doesn't reveal anything about ***quality***. You will assess the quality of your outputs in your evaluation.

Outputs Tips:

- Make sure your outputs have activities and resources associated with them. This is one way a logic model is useful—to check whether a program has planned how it will create a product or deliver a service.
- Many people identify specific numbers for their outputs. Begin with an estimate, based on experience, desired impact, and resources available. Don't get stuck on exact numbers; you can adjust them later.

Build Your Logic Model: List all the outputs you expect your program's activities will produce. Place these in the Outputs box of the logic model template or on the "Activities/Outputs" tab of the online Logic Model Builder.

Outcomes

Other Terms for "Outcomes"

You might also hear outcomes called "results," "impacts," or "objectives."

Outcomes express the results that your program intends to achieve if implemented as planned. Outcomes are the **changes that occur or the difference that is made** for individuals, groups, families, organizations, systems, or communities during or after the program.

Outcomes answer the questions: "What difference does the program make? What does success look like?" They reflect the core achievements you hope for your program.

Outcomes should:

- Represent the results or impacts that occur because of program activities and services
- Be within the scope of the program's control or sphere of reasonable influence, as well as the timeframe you have chosen for your logic model
- Be generally accepted as valid by various stakeholders of the program
- Be phrased in terms of **change**
- Be **measurable.** (It may take work to translate them into measurable indicators.)

Types of Change: Organizations with diverse missions and services share common categories of outcomes, because outcomes are about **change**: changes in **learning**, changes in **action**, or changes in **condition**.

Changes in Learning:

- New knowledge
- Increased skills
- Changed attitudes, opinions, or values
- Changed motivation or aspirations

For example:

- Participating new mothers increase their knowledge of child development.
- Teens ages 15-18 increase their commitment to community service.

Changes in Action:

- Modified behavior or practice
- Changed decisions
- Changed policies

For example:

- Participating new mothers engage in developmentally appropriate child rearing practices.
- Teens ages 15-18 participate in community service.

Changes in Condition:

- Human
- Economic
- Civic
- Environment

For example:

- Children of participating new mothers are at their appropriate developmental stage.
- There's a decrease in unemployment rate among women participating in the program.

Focus of Outcomes: Clarify who or what will experience the intended changes.

1. *Individual, Client-Focused Outcomes*: These reflect the difference the program will make in the lives of those directly served by the program. Examples include:

- Parents use alternative discipline approaches (behavior)
- Participants are better able to organize and advocate for their rights (skills)
- Children are better prepared to enter school (changed status/condition)

2. *Family or Community Outcomes*: Some programs intend to create change for families, neighborhoods, or whole communities. Examples include:

- Improved communication among family members
- Increased parent-child-school interactions
- Decreased neighborhood violence
- Shifts in authority and responsibility from traditional institutions to community-based agencies and community resident groups
- Community group has an inclusive membership policy, work group practices, and democratic governance

3. *Systemic Outcomes*: These illustrate changes to overall systems and might include cases where agencies, departments, or complex organizations work in new ways, behave differently, share resources, and provide services in a coordinated fashion. Examples include:

- Integrated system of services or interagency resource sharing
- Greater coordination among partners in a system

4. *Organizational Outcomes*: Some programs lead to internal outcomes—both individual and institutional—that affect how well a program can achieve external outcomes. These produce improvements in program management and organizational effectiveness. Examples of organizational outcomes include:

- Increased efficiency
- Increased staff motivation
- Increased collaboration with other organizations

Chain of Outcomes. Not all outcomes will occur at the same time. Some outcomes must occur before the achievement of other outcomes and program goals. Distinguish between outcomes that occur over the short-, intermediate, and long-term. This is referred to as the "**chain of outcomes**."

- **Short-term Outcomes:** *What change do you **expect** to occur either immediately or in the near future?* Short-term outcomes are those that are the most direct result of a program's activities and outputs. They are generally achievable in one year. They are typically not ends in themselves, but are necessary steps toward desired ends (intermediate or long-term outcomes or goals).

- **Intermediate Outcomes:** *What change do you **want** to occur after that*? Intermediate outcomes are those outcomes that link a program's short-term outcomes to long-term outcomes.

- **Long-term Outcome:** *What change do you **hope** will occur over time?* Long-term outcomes are those that result from the achievement of your short- and intermediate-term outcomes, and often take a longer time to achieve. They are also generally outcomes over which your program has a less direct influence. Often long-term outcomes will occur beyond the timeframe you identified for your logic model.

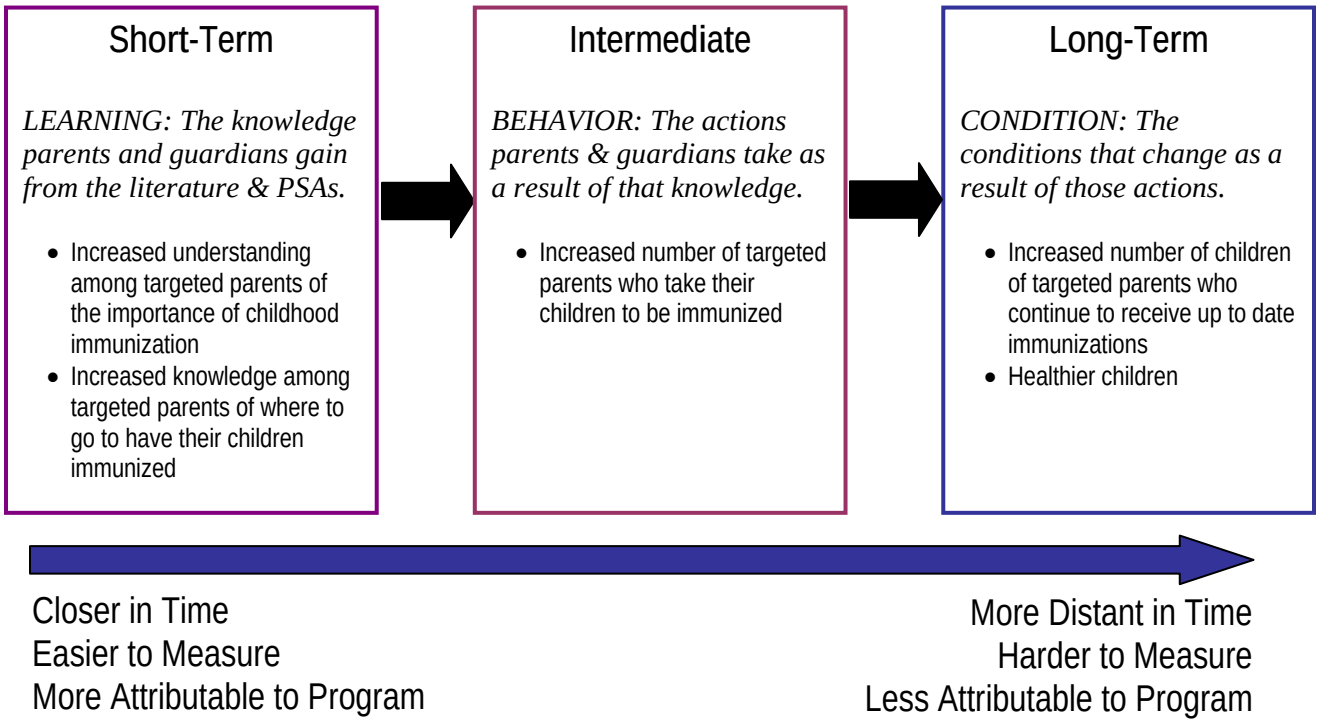
The example on the next page illustrates the connections between different levels of outcomes.

Outcomes Chain Example

Good Health for Kids is an advocacy organization that educates parents and guardians about the importance of immunizing children. The staff has identified the following program activities:

- Develop educational literature
- Disseminate literature to social service agencies
- Develop public service announcements (PSAs)
- Identify and work with radio stations to air radio spots

The outcomes associated with these activities fall into three categories:



A worksheet on the Chain of Outcomes concept is attached as Appendix B.

Outcomes vs. Outputs

Since outcomes are sometimes confused with outputs, we'd like to go over the differences again. Here are their distinguishing characteristics:

- ***Outputs*** are the direct and measurable ***products*** of a program's activities and services; they are often expressed in terms of volume or units delivered.
- ***Outcomes*** are the ***results*** or ***impact*** of the activities and services. Outcomes often represent the results of multiple outputs; each outcome usually corresponds to more than one output.

Output	Outcome
# of new mothers receiving six home visits	Participating new mothers increase their knowledge of child development
# of public service announcements on child abuse and neglect airing on radio and television # of pamphlets about child abuse and neglect distributed to local libraries and social service agencies	Target audiences are knowledgeable about the signs of child abuse and neglect and the appropriate actions to take
Action Plan developed to clean and monitor neighborhood play areas	Residents in Community X sign up to clear vacant lots and build playgrounds
# of funding proposals submitted # of meetings held with potential individual donors	Increased and diversified resources for the program
Board job descriptions developed Board policy manual written and approved	Board members understand their responsibilities
# of meetings held with legislators # of legislators receiving policy options paper	Increased legislators' awareness of policy options

Outcome Scope: Clarify the scope of your outcomes by creating realistic boundaries. Do not identify outcomes beyond your program's reach. Possible characteristics to use in narrowing an outcome's scope include:

- Geography (people in Harrison County; students attending Hillandale High School)
- Age (youth ages 8-12; children in grades K-6)
- Income level or financial circumstance (low-income; middle class with bad credit)
- Ethnicity or culture (predominantly Latino; recent immigrants)
- Other characteristics of the people to be served (part-time worker; victims of sexual assault)

 **Build Your Logic Model:** Identify the changes that will occur as a result of your program. Place these in the Outcomes boxes of the logic model template, or on the Outcomes tab of the online Logic Model Builder.

- Place the outcomes you **expect** to see during the program term in the "short-term" box
- Place the outcomes you **want** to see over more time in the "intermediate" box
- Place the outcomes you **hope** to see eventually in the "long-term" box.

Other Terms for
"External Factors"

You might also hear external factors called "surrounding circumstances" or "environmental factors."

External Factors

Programs do not occur in a vacuum. Many factors over which you have little or no control may affect your program's outcomes. These external factors – such as the political and economic situation, social influences, and even weather—can help or hinder a program's success. Changes in any of these contextual factors may require program adjustments.

Review some of the following categories and consider what external factors may affect your program. Keep stakeholders informed of these possibilities, to help identify and explain unexpected hurdles and unanticipated outcomes.

Political environment

- Is the current political environment supportive of your program strategies?
- Is there a risk of losing that support if particular policies or funding sources change?

Economic situation

- Will this economy support your program goals and outcomes?
- Are there economic barriers to achieving your outcomes?

Social/cultural context

- Are you working in a community that welcomes your program?
- Is community support for your program a critical component? If so, are there political or economic characteristics that will influence the community and affect your program?

Geographic and other natural constraints

- Is your work dependent on reliable public transportation to reach your constituency?
- Is transportation a critical challenge to achieving program outcomes?
- Is bad weather likely to interfere with service delivery?

Build Your Logic Model: Identify the external factors that will, or could, affect the success of your program in the "External Factors" box on the template, or in a Comments box in the online Logic Model Builder.

Theory of Change & the Logic Model

Every social program is based on a *theory of change*—a set of ideas that describes how and why the program will work. The theory connects what is happening in the program (the program's activities) with the program goal – it expresses the relationship between actions and results.

A theory of change may be based on:

- Wisdom and experience: Your work in the field leads you to believe that this set of actions will lead to your intended results.
- Research and evaluation: Formal research indicates that this set of strategies has been successful in achieving your intended results.
- Best practices: Well-regarded and successful programs in the field use these strategies to achieve the results you are seeking.

Investing time identifying your organizational theory of change can be a powerful exercise. This often involves leaders and staff members from all levels of an organization and may be part of a strategic planning process. It reveals assumptions behind your work and connects multiple programs to the organization's reason for being.

Even if your organization does not engage in a formal theory of change process, we encourage you to complete your logic model by including two final program elements: Rationales and Assumptions.

Rationales

A program's *rationales* are the beliefs about how change occurs in your field and with your specific clients (or audience), based on research, experience, or best practices. For example, the Women at Work program's rationales are:

> *Current research on women leaving public income support systems indicates that targeted job training, partnered with a menu of support and coaching services, can help women get and keep living wage jobs.*
>
> *Success in moving into higher-paying jobs and achieving economic self-sufficiency is closely related to the availability of opportunities for training and education.*
>
> *The likelihood of a woman getting and retaining a job after leaving public income support systems is increased when support services are available.*

These rationales all demonstrate a core set of beliefs based on knowledge about how changes occur in the field.

Build Your Logic Model: If you choose to include Rationales in your logic model, record them in the "Rationales" box on the template, or on the "Rationale/Assumptions" tab in the online Logic Model Builder.

Assumptions

The *assumptions* that underlie a program's theory are conditions that are necessary to program success, and you believe are true. Your program needs these conditions in order to success, but you believe these conditions already exist – they are not something you need to bring about with your program activities.

These assumptions can refer to facts or special circumstances in your community, region, and/or field. Examples of program assumptions are:

> *There are living wage jobs available within a reasonable distance of this neighborhood, with adequate public transportation to reach those jobs.*
>
> *Two counselors can serve a client population of approximately 40.*

The first assumption demonstrates that there is a circumstance within the community that supports the program. The second example shows that the program manager has clearly thought out how many counselors are needed to support the number of participants the program will serve.

Build Your Logic Model: If you choose to include the Assumptions behind your program choices in your logic model, record them in the "Assumptions" box on the template, or on the "Rationale/Assumptions" tab in the online Logic Model Builder.

Logic Model Review

Once your logic model is complete, take time to revisit and review your work. Consider the following questions:

- Does your organization have adequate resources to implement the activities and achieve the desired outcomes? If you need further resources, is that reflected in your activities?

- Have you included all the *major* activities needed to implement your program and achieve expected outcomes? Would the activities list enable someone who is unfamiliar with your program to understand its scope?

- Have you expressed your outcomes in terms of change? Have you identified who/what will experience that change, and over what time period?

- Do activities, outputs, and short- and long-term outcomes relate to each other logically (the "if-then" relationship)?

- Does your logic model clearly identify the scope of your program's influence?

- Have you considered a variety of perspectives? It's a good idea to get feedback from colleagues and stakeholders. (Remember, the online Logic Model Builder makes collaboration easy, and gives you a head start on evaluation planning by pre-filling work from one plan to the next.)

Next Steps

Now that you have created a logic model, put it to work!

- Use it to **build clarity** and consensus with colleagues and volunteers about intended outcomes.
- Use it to **communicate** with funders about accomplishments and resource needs.
- Use it to **tell your story** to potential clients, donors, and media.
- Use it to **evaluate** your work – a sound logic model is the foundation of effective evaluation.

Innovation Network provides several resources to help you develop evaluation plans. In addition to our in-person training, we offer an Evaluation Plan Builder and an evaluation workbook through the Point K Learning Center (www.innonet.org/pointk; free registration is required).

Thank you for your interest!

We hope this workbook has been valuable to you and that you'll continue to use it as a reference for your program logic models.

If you have any questions about program planning or evaluation, or are interested in our in-person services, please visit our website, www.innonet.org or contact us at:

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Appendix A: Logic Model Template

Program Name:

PROBLEM STATEMENT:

PROGRAM GOAL (S):

Resources
What resources do we have to work with?

Activities *What happens in our organization?*	**Outputs** *What are the tangible products of our activities?*	**Short-term Outcomes** *What changes do we <u>expect</u> to occur within the short term?*	**Intermediate Outcomes** *What changes do we <u>want</u> to see occur after that?*	**Long-term Outcomes** *What changes do we <u>hope</u> to see over time?*
Activity Category				

Appendix A: Logic Model Template

Program Name:

Activities *What happens in our organization?*	**Outputs** *What are the tangible products of our activities?*	**Short-term Outcomes** *What changes do we <u>expect</u> to occur within the short term?*	**Intermediate Outcomes** *What changes do we <u>want</u> to see occur after that?*	**Long-term Outcomes** *What changes do we <u>hope</u> to see over time?*
Activity Category				

Appendix A: Logic Model Template

Program Name:

Rationale(s): *The explanation of a set of beliefs, based on a body of knowledge, about how change occurs in your field and with your specific clients (or audience).*	**Assumptions:** *Facts or conditions you assume to be true.*
External Factors:	

Point K Learning Center

WORKSHEET:
DEVELOPING AN OUTCOMES CHAIN

Outcomes don't all happen at once. This worksheet will help you see how your outcomes connect to one another in a logical chain – sometimes called a Pathway of Outcomes, or an "Outcomes Chain." As you build your logic model, make sure that your activities are moving you toward your program goals. Even if you won't be able to achieve those goals within the program timeframe, it's important to see how they are connected.

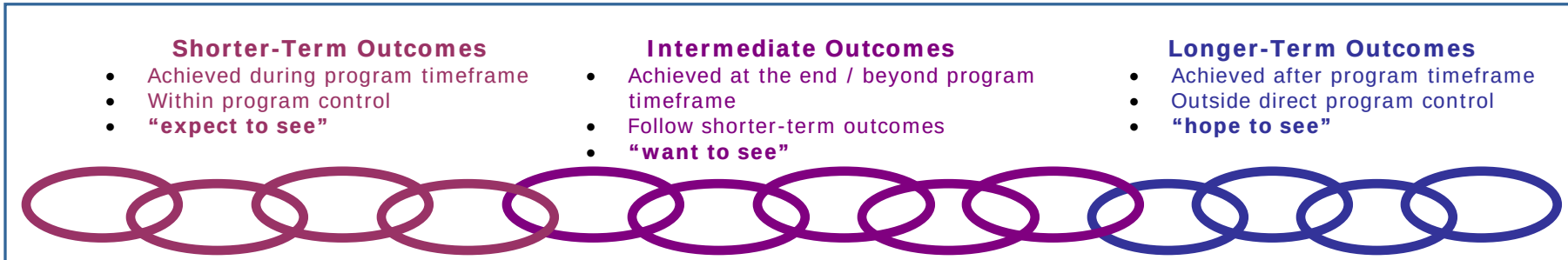


Fig. 1: Outcomes Chain

Your shorter-term outcomes might happen right away—early in your program, or sometime during your program. Shorter-term outcomes are the results you **expect** to see during your logic model's timeframe. Shorter-term outcomes lead to intermediate outcomes: the results you **want** to see. Intermediate outcomes may happen at the end of your program, or just outside your program's timeframe. Both shorter-term and intermediate outcomes need to happen before your longer-term outcomes can happen. Longer-term outcomes are closely related to your program goal(s), and will happen after your program timeframe—they aren't completely within your control, but you **hope** they will happen.

Fig. 2: Types of Outcomes

Think about the connections between outcomes. **Shorter-Term Outcomes** lead to…	**Intermediate Outcomes** which in turn lead to…	**Longer-Term Outcomes**
What are the most direct results – the outcomes you expect to achieve? What has to happen first?	What results come next – the things you want to happen, but that can't happen without your short-term outcomes**?**	What do you hope will result over time, as a result of your short and intermediate outcomes?

Think about the connections between outcomes. **Shorter-Term Outcomes** lead to…	**Intermediate Outcomes** which in turn lead to…	**Longer-Term Outcomes**
What are the most direct results – the outcomes you expect to achieve? What has to happen first?	What results come next – the things you want to happen, but that can't happen without your short-term outcomes**?**	What do you hope will result over time, as a result of your short and intermediate outcomes?

LOGIC MODEL
Guide to Terms and Definitions

ELEMENTS OF THE MODEL "The Program"	AS MEASURED BY "The Outcomes"
DESIRED RESULTS The overall long-term vision or goal for children, adults, families, or communities. An out-of-school time program *alone* usually cannot accomplish the results, but should contribute to them. Results usually cannot be measured directly, but are composites of multiple measures.	**INDICATORS** Measures, for which data exist, that quantify and track community-wide progress toward results. They require *community-wide effort* to move and reflect substantial changes across a community. Indicators can: - Change over a few years or take several decades to change - Reflect changes in people, systems, or policies - Be specific rates or numbers *Ultimate Indicators* Measures of *long-term* community-wide progress toward desired results. They usually require significant investment and time to change. **Require community-wide effort to affect** *Interim Indicators* Measures of *short-term or interim* community-wide progress toward desired results.
MOTIVATING CONDITIONS AND CAUSES The conditions, causes, circumstances, factors, issues, etc. that need to change in order to achieve the results. The program will address *some* of these conditions or causes, but not all of them.	
PROGRAM STRATEGIES The program's broad approaches or general action plan. The strategies tackle a *subset* of the above motivating conditions and causes.	**PROGRAM PERFORMANCE MEASURES** Measures of productivity and changes that come about as a result of the out-of-school time program's work. As a result, they typically reflect "smaller" changes than indicators. They are measures of what the program's strategies and activities (to the left) accomplish. *Measures of Effect* Changes in the target populations (i.e., children in the out-of-school time program) that come about as a result of program strategies and activities. Measures of effect often reflect changes in knowledge, skills, attitude, or behavior. **Can be affected by the program** *Measures of Effort* Direct outputs of program activities—what and how much the program accomplishes. Measures of effort can include the #s of classes, materials developed, trainings offered, etc. or include measures of customer satisfaction.
PROGRAM ACTIVITIES The specific set of actions, interventions, or services that the program will undertake to implement the above strategies. Each activity will likely change only one or a few of the conditions and causes that need to change in order to reach the desired result. Each activity may affect only a subset of the target population.	

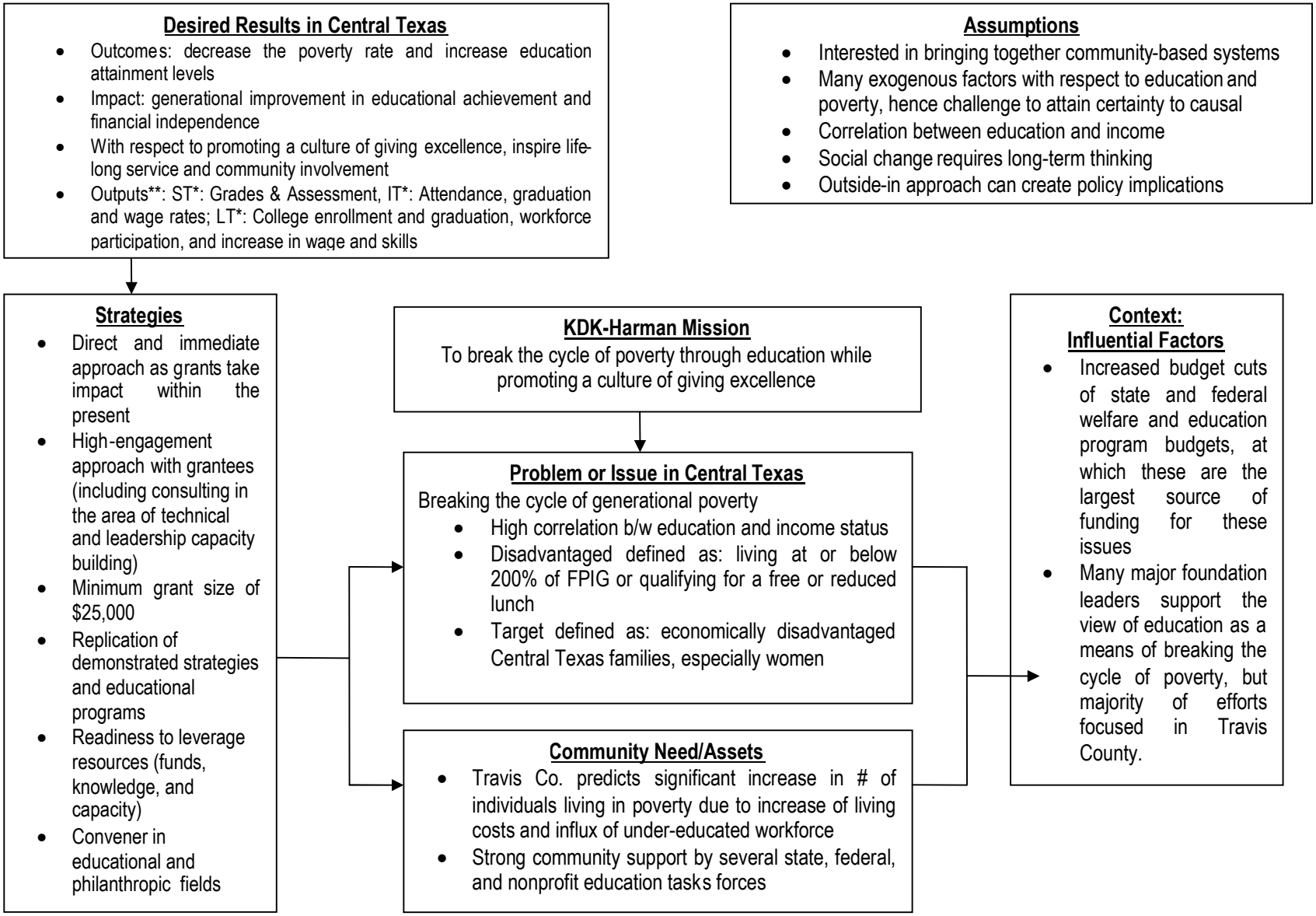
Diagram from *Learning From Logic Models in Out-of-School Time*
by Harvard Family Research Project at www.hfrp.org

OUT-OF-SCHOOL TIME (OST) PROGRAMS
Examples of Logic Model Components

ELEMENTS OF THE MODEL "The Program"	AS MEASURED BY "The Outcomes"
DESIRED RESULTS Improve the physical, social, and emotional well being of children. Improve children's academic development and performance.	**INDICATORS** *Ultimate Indicators* - Reduced substance use rates among teens - Reduced teen pregnancy rates - Reduced #s of violent acts among adolescents and teens - Reduced dropout rates - Increased percentage of students graduating from high school - Increased percentage of students attending college **Require community-wide effort to affect** *Interim Indicators* - Improved test scores in reading, math, or science - Reduced #s of anti-social behaviors or behavior problems - Decreased student suspensions - Improved grades
MOTIVATING CONDITIONS AND CAUSES - Many parents working outside of the home - Children with unstructured and unsupervised time in the after school hours - Low academic performance among low-income children - Lack of positive adult-youth relationships - Children at greater risk for involvement in crime and substance abuse in the hours after school - Television as the most common activity for children after school	
OST PROGRAM STRATEGIES - Youth development and leadership - Academic enrichment - Curriculum development and enrichment - Collaboration	**PROGRAM PERFORMANCE MEASURES** *Measures of Effect* - Development of emotionally supportive relationships with adults - Increased emotional adjustment - Increased social competence - Higher self-esteem and confidence - Improved study habits - Higher numbers of honors or awards received - Improved peer relationships - Improved attitudes toward school - Improved school attendance/decreased truancy **Can be affected by the OST program** *Measures of Effort* - # of children served in the OST program and participant demographics - # of classes/sessions/trainings held - # and type of products developed - Measures of program cost-effectiveness - Parent and child satisfaction rates with the OST program
OST PROGRAM ACTIVITIES - Homework help and tutoring - Mentoring - Rap sessions - Arts activities - Recreation activities - Technology training - Literacy activities - Career counseling and development - Community service or work projects - Intergenerational activities - Conflict resolution training	

Diagram from *Learning From Logic Models in Out-of-School Time*
by Harvard Family Research Project at www.hfrp.org

KDK-Harman Logic Model Development
Grantmaking Plan



*ST=short-term, IT=intermediate-term, and LT=long-term

**As unit of analysis is based on an individual/program level, then outputs are similarly gauged within this context.

Council of Michigan Foundations
Serving grantmakers. Advancing giving.

TRANSFORMING Michigan Philanthropy through Diversity & Inclusion

Transforming Michigan Philanthropy Through Diversity & Inclusion: 2008-2013

Goal: To increase the effectiveness and accountability of organized philanthropy in Michigan.

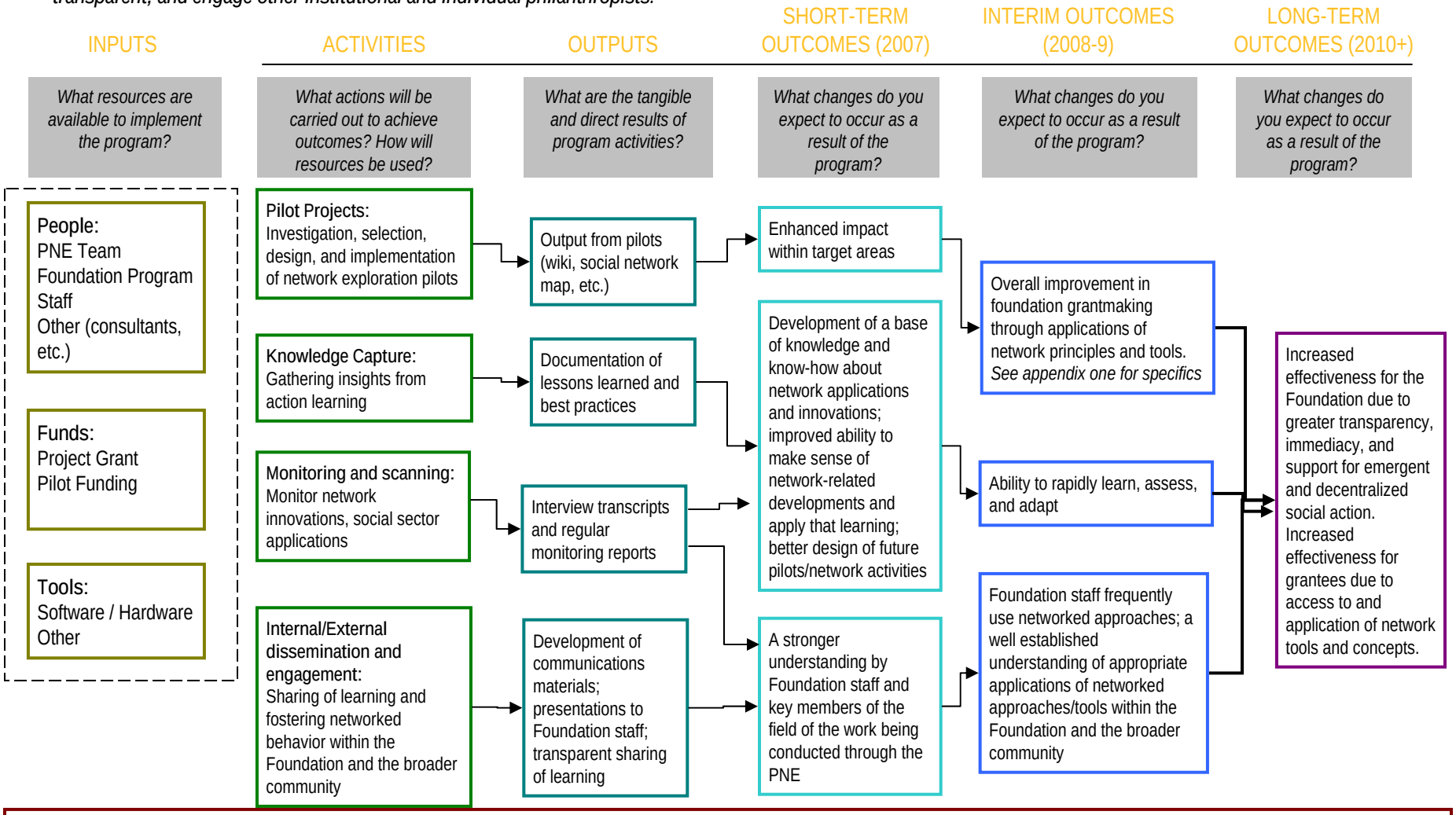
The initiative will be:

- Guided by an Advisory Committee of CMF trustees, (including governance committee members) members, partners
- Managed by VP for Education, Communications, External Relations; with Director of Diversity and Inclusive Practices and VP for Finance and Administration
- Strengthened by the partnership with the Diversity in Philanthropy Project (DPP)
- Evaluated by the Community Research Institute, GVSU

Diversity Project	Strategies	Tactics	Outcomes	Measure Instruments
OBJECTIVE 1 To become a model regional association and resource for the national field of organized philanthropy.	To institutionalize diversity and inclusion throughout CMF staffing, operations, governance, membership and member services/programs. To develop, test and share resources including; data, tools, case studies, resources with the regional associations and national field via CMF/DPP partnership.	**Organizational & Board Development** ▪ Data collection: demographics, policies, perceptions ▪ Policy/procedure refinement ▪ Training and coaching ▪ Accountability systems **CMF Membership** ▪ Demographic Study ▪ Analysis/refinement of membership criteria ▪ Market research/outreach to tribal, ethnic racial donors/funds **Regional Associations** ▪ Knowledge sharing ▪ Collaborations **National Field** ▪ Presentations ▪ Data/stories in national resources ▪ CMF, DPP, Forum websites	▪ More diverse representation among staff, trustees, vendors ▪ More inclusive practices-work board/environment ▪ More diverse members ▪ More culturally competent practices ▪ Increased member satisfaction ▪ Increased coordination/ sharing among regional associations ▪ Data, case studies and other documentation ▪ Membership criteria ▪ Case study and documentation of CMF work and results ▪ Priority area for regional associations	▪ Audit of staff, trustee & vendors ▪ Survey of staff, board, attitudes & perceptions ▪ Demographic study of membership (inc. YACS) ▪ Audit of member policies ▪ Audit of invitations to speak, mentions in publications, requests for technical assisitance, links to web sites
OBJECTIVE 2 To increase member awareness, understanding and action in diversity, inclusion and social equity grantmaking.	To provide all resources necessary to move members along awareness to action continuum	▪ Communications ▪ Education programs ▪ Web resources ▪ Technical Assistance ▪ Peer role models (obj. 3) ▪ Policy Briefings	▪ Stories, articles and data ▪ Educational programs ▪ Technical assistance services ▪ Communications frames and messages ▪ Knowledge resources	▪ Demographic Study with national comparability ▪ Program participation #s ▪ Program evaluation ratings ▪ Downloads: web resources ▪ Member survey ▪ Requests for TA
OBJECTIVE 3 To help 20 foundations achieve their goals for diversity, inclusion and social equity.	To form and support a Peer Learning Network/ Community of Practice	▪ Data collection ▪ Symposium 3/09 ▪ Member focus group 3/09 ▪ Evaluation and documentation	▪ More diverse staff, trustees, vendors ▪ More inclusive policies, practices, environments ▪ Resources, data, tools ▪ Peer role models to motivate/ support other CMF members ▪ Case studies ▪ Evaluation data	▪ Audit of engagement & participation ▪ Audit of staff, trustee demographics ▪ Audit of staff/board perceptions ▪ Audit of success achieving foundation goals and outcomes
OBJECTIVE 4 To increase the diversity of foundation staff, executives and trustees.	To develop fellowships, internships or other strategies for attracting more diverse individuals to careers in philanthropy To develop professional development opportunities for diverse foundation staff to advance to executive roles To develop opportunities for diverse individuals to become foundation trustees	▪ Research member foundation needs ▪ Partner with local/state/nat'l higher education, tribal/ethnic/ racial alumni/business assoc. ▪ Conduct career opportunity events ▪ Engage YAC members ▪ Share model and results with national field	▪ More diverse philanthropic community ▪ More culturally competent foundations ▪ Models for adaptation or replication nationally	▪ Audit of foundation staff, trustee, YAC demographics ▪ Program evaluations ratings ▪ Audit of engagement and resulting opportunities ▪ Member survey ▪ Audit of contacts from other philanthropy associations

Philanthropy and Networks Exploration (PNE) Logic Model

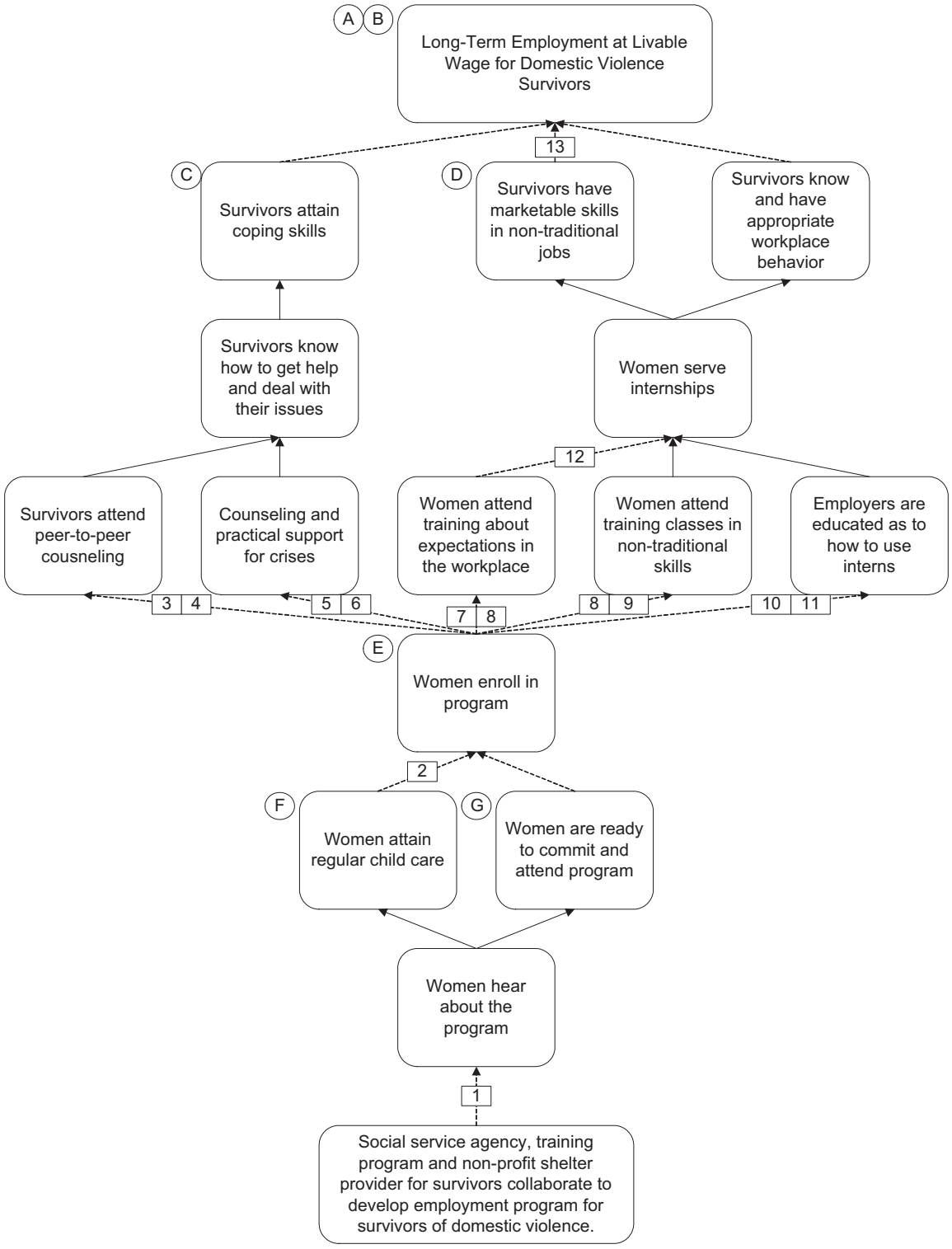
GOAL: *The PNE is an inquiry into how networks can help increase philanthropic effectiveness. This exploration hopes to test and introduce network tools and concepts within the Packard Foundation, and to support the use of these tools and concepts by Packard Foundation grantees; to make this learning process transparent; and engage other institutional and individual philanthropists.*



Assumptions: *Networks can increase traditional philanthropy's effectiveness and facilitate exploration of new fields; engaging a larger and more diverse set of stakeholders results in stronger strategies; by expanding their reach, non-profits can broaden their appeal and activate their members; the Foundation and its grantees can have a greater impact by working "wikilly – being transparent, rapidly making learning available and continuously adapting (immediacy), and fostering decentralized and emergent action; organizational change within the Foundation will be catalyzed from the bottom up—the success and learning from pilots will generate a desire among the Foundation staff to work "wikily".*

External factors: *The field is constantly changing based on the creation of new technologies, publication of new research, and use of new types of networked approaches both within and outside of the social sector. Given the current level of excitement, are we in a "wiki bubble?" Also, the needs/desires of the Foundation's staff as well as the needs of the areas that the Foundation serves will continue to change.*

Project Superwoman Example



Final Narrative: Project Superwoman

Project Superwomen was founded as a collaboration of a social service provider, a nonprofit employment-training center, and a non-profit shelter provider for female domestic violence victims. The group's goal was to help women obtain a type of employment that would keep them out of poverty, off public assistance while providing stability and upward mobility. The group chose jobs in electrical, plumbing, carpentry and building maintenance because they provided entry-level positions, possible union membership, and opportunities for advancement at livable wages.

Based on the assumptions that women can learn non-traditional skills and that employers
could be identified that would hire them, the project's goal was to provide both the training and support needed by this population in order to enter and remain in the workforce. The group believed that most of the women they could train would be single mothers, coming from abusive situations and would need psycho-emotional counseling, especially regarding low self-esteem and impaired coping skills. They also recognized that even women whose lives are fairly stable might face crises from time to time requiring practical help or psychological support. For some of the women who had not worked before, the group included training in non-traditional skills, training in workplace expectations and intensive psychological supports.

Based on their resources, the group decided that they could provide assistance with some
crises, such as housing evictions or court appearances, but could not be responsible for
completely stabilizing the lives of their clients. This dictated their screening process ensuring that new women entering the program had already settled major issues, such as housing, substance abuse, or foster care.