Building Logic Models

A presentation for the Proteus Fund Diversity Fellows

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August 17, 2012

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Learning Objectives

1. Understand the relationship between Theories of Change and Logic Models

2. Get clarity on at least one definition of Logic Model

3. Learn how to use a Logic Model framework

4. Discuss the use of Logic Models for evaluation and learning purposes
The Big Picture

Why does our organization exist?

What is the change you want to create in the world?

What is your plan to create that change in the world?
The Big Picture

- Mission Statement
  - Mission
- Theory of Change
  - Vision
  - Impact
- Logic Model
  - Plan
Theory of Change is “Your hypothesis about how change happens”

If this then that statement

For example, one randomly chosen theory of change …

… starts with the observation that there is a lack of professionals of color working, training, managing, and making decisions in the philanthropic sector because of structural barriers to entry, however

If we provide promising people of color access to formal training, to hands on work experience, and to connections with professionals and groups in philanthropy

Then we will increase the opportunity for promising people of color to access positions in philanthropy, and

If these individuals grow into decision-making positions in philanthropic organizations

Then their organizations and the philanthropic sector will become more inclusive.
What is a Logic Model?
The Big Picture

Mission Statement

Mission

Vision

Impact

Theory of Change

Plan

Logic Model
A Logic Model is not a black box!
A Logic Model is a **MODEL**

**Resources** → **Activities** → **Outputs** → **Outcomes**

**What we INVEST** → **What we DO** → **What CHANGES**

A schematic description of a system, theory, or phenomenon that accounts for its known or inferred properties and may be used for further study of its characteristics.
A Logic Model is **LOGIC**

- **Resources**
- **Activities**
- **Outputs**
- **Outcomes**

You need certain resources to be able to run your program.

**IF** you have access to those resources, **THEN** you can accomplish your activities.

**IF** you can accomplish these activities, **THEN** you will have delivered what you planned.

**IF** you have delivered what you planned, **THEN** there will be benefits for people, organizations, communities, or systems you serve.
“Life is what happens to you while you’re busy making other plans”

John Lennon
Learning Objectives

1. Know what a Logic Model is
2. Understand the relationship between Theories of Change and Logic Models
3. Learn how to use a Logic Model framework
4. Discuss the use of Logic Models for evaluation and learning purposes
A Logic Model Framework

**Problem Statement:**
A description of the problem that a program seeks to solve

**Goal**
The intended aim or impact over the life of a program

**Rationales:**
Why will program activities produce results?

**Assumptions:**
What factors necessary for program success are already in place?

**Resources:**
People, time, materials, funds dedicated to or consumed by a program

**Activities:**
The actions a program takes to achieve desired results

**Outputs:**
The tangible, direct products of program activities

**Outcomes:**
The changes expected to result from a program – changes among clients, communities, systems, or organizations

**External Factors:**
Other influences on program results; circumstances beyond program control

Source Innonet
Example: Logic Model – Training Workshops

**Problem Statement**
Funders require grantees to include a logic model in funding requests but grantees have limited understanding of logic models and are unable to fulfill the funding requirement.

**Goal**
Increase the opportunity for grantees to obtain funding by using logic models as a program design and development tool.

**Logic Model Diagram:**
Logic Model Example - Training Workshop Series

**Long-Term Outcomes**
- Improved planning - programs achieve positive results
- Improved evaluation - more credible and useful data

**Intermediate-Term Outcomes**
- Use logic models in planning and evaluation - in grantee work
- Model quality logic model practice

**Short-Term Outcomes**
- Increased knowledge of logic models
- Increased ability to create a meaningful logic model of program
- Increased confidence in using logic models

**Rationales & Assumptions**
- Trainer
- Training materials and tools
- Equipment: laptops, LCD projector
- Training room

**Resources**
- Training (2 hours)
- Individual Practice
- Group Practice
- Q&A

**Activity Groups**
- 10 two-hour training sessions held
- Each participant completes 3 worksheets by the end of the training session
- Each group produces one sample Logic Model by the end of the training session
- 10 Minutes left at the end of each class for Q&A
Logic Models Step by Step: Problem Statement

**Problem Statement:**
A description of the problem that a program seeks to solve

- What needs to change?
- Why is there a need for intervention?
- What social problem does my program solve?”
- Include “who, what, why, where, when, and how”

**Example**

*In <city name>, low-income residents with bad or no credit do not have resources available to help them improve their living situation*
Your Turn: ...

Problem Statement:
A description of the problem that a program seeks to solve
Example: Logic Model – Training Workshops

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**Outputs**

- 08.17.12
- Proteus Fund - Diversity Fellows - Logic Models Training
Logic Models Step by Step: Goal Statement

Goal
The intended aim or impact over the life of a program

- The solution to your problem statement
- Serves as a frame for all elements of the logic model

Goal Tips

- Phrase your goal in terms of the change you want to achieve, rather than a summary of what you’re going to do
- Don’t make your goal too broad and general
- Specify the target population
- All logic model components should be connected to your goal
Examples of Goal Statements

• Significantly increase the literacy rates among children with reading difficulties at XYZ 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 XYZ 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 XYZ area
Your Turn: ...

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A Logic Model Framework

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Other influences on program results; circumstances beyond program control

Source: Innonet
Logic Models Step by Step: Rationales

Rationales:
A core set of **beliefs** about how change occurs in your field and with your specific population, based on **research**, **experience**, or **common practices**

Example:
- *Success in moving into higher-paying jobs and achieving economic self-sufficiency is closely related to the access to training and education*
- *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*
Assumptions:

The **conditions** that are necessary to program success, and you believe are true and already exists, i.e., they’re not something you need to create with your program activities.

Example:

- *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 population of approximately 40.*
Your Turn: ...

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Example: Logic Model – Training Workshops

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Rationales Assumptions

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<thead>
<tr>
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Long-Term Outcomes
Improved planning - programs achieve positive results
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Intermediate-Term Outcomes
Use logic models in planning and evaluation - in grantee work
Model quality logic model practice

Short-Term Outcomes
Increased knowledge of logic models
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Logic Models Step by Step: Resources (Inputs)

- List both the resources that you currently **have** and those that you **need** to get access to in order to support your program

**Common Resources**
- **Human resources**: Full- and part-time staff, consultants, pro bono staff services, and volunteers
- **Financial resources**
- **Space**
- **Technology**
- **Other Equipment and Materials** specific to the program
Resource Tips

- Identify the major resource categories for your program
- Be as specific as you can, but don’t be too specific
- Use your resource list as the foundation for developing a program budget

**Resources:**
People, time, materials, funds dedicated to or consumed by a program

<table>
<thead>
<tr>
<th>Not specific enough</th>
<th>Just right</th>
<th>Too specific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff</td>
<td>3 full-time staff 1 part-time</td>
<td>3 FT staff @ 30 hrs/ wk 1 PT staff @ 20 hrs/ wk</td>
</tr>
<tr>
<td>Supplies</td>
<td>Art Supplies</td>
<td>25 paintbrushes 50 bottles of paint Soap</td>
</tr>
</tbody>
</table>
Example: Logic Model – Training Workshops

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Funders require grantees to include a logic model in funding requests but grantees have limited understanding of logic models and are unable to fulfill the funding requirement.

Goal
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Rationales
- Resources:
  - Trainer
  - Training materials and tools
  - Equipment: laptops, LCD projector
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Logic Model Diagram: Logic Model Example - Training Workshop Series

Activity Groups
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Outputs
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Logic Models Step by Step: Activities

- What you do with your resources to produce outputs, achieve outcomes and, ultimately, achieve your goal

Common Activities
- 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).
## Activities: How Specific Should you be?

### Activity Group: Training

<table>
<thead>
<tr>
<th>ACTIVITIES:</th>
<th>This set of activities is <em>not detailed enough</em>. It omits a number of key steps needed to implement mentor training.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Hire trainer</td>
<td></td>
</tr>
<tr>
<td>• Conduct training</td>
<td></td>
</tr>
</tbody>
</table>
# Activities: How Specific Should you be?

**Activity Group: Training**

<table>
<thead>
<tr>
<th>ACTIVITIES:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Conduct Google search</td>
</tr>
<tr>
<td>• Interview best practice program staff</td>
</tr>
<tr>
<td>• Hire curriculum writer</td>
</tr>
<tr>
<td>• Write first draft of material</td>
</tr>
<tr>
<td>• Send material to 6 reviewers</td>
</tr>
<tr>
<td>• Compile responses</td>
</tr>
<tr>
<td>• Set up review meeting</td>
</tr>
<tr>
<td>• Edit curricular material</td>
</tr>
<tr>
<td>• Copy curricular material</td>
</tr>
<tr>
<td>• Contact different training spaces</td>
</tr>
<tr>
<td>• Fill out applications for space</td>
</tr>
<tr>
<td>• Buy snacks</td>
</tr>
<tr>
<td>• Arrange for markers and flip charts</td>
</tr>
<tr>
<td>• Obtain men's and ladies room keys</td>
</tr>
</tbody>
</table>

This is **too detailed**. It would more appropriately belong in a work plan.
### Activities: How Specific Should you be?

**Activity Group: Mentor Training**

<table>
<thead>
<tr>
<th>ACTIVITIES:</th>
<th></th>
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<tbody>
<tr>
<td>• Research best practices</td>
<td>This is just about the <strong>right level of detail</strong> for a logic model.</td>
</tr>
<tr>
<td>• Develop curriculum</td>
<td></td>
</tr>
<tr>
<td>• Prepare materials</td>
<td></td>
</tr>
<tr>
<td>• Arrange logistics</td>
<td></td>
</tr>
<tr>
<td>• Select trainer</td>
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<td>• Conduct training</td>
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</tr>
<tr>
<td>• Develop &amp; implement feedback survey</td>
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Your Turn: ...

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**Outputs**
- Improved planning - programs achieve positive results
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- Use logic models in planning and evaluation - in grantee work
- Model quality logic model practice
- Increased knowledge of logic models
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Logic Models Step by Step: Outputs

- **The products or deliverables** of your effort not the benefits, results, or changes it produces.
- Outputs **quantify** activities, but do **not** reveal anything about **quality** of activities.

**Examples (numbers and descriptions)**
- Classes taught or meetings held
- Materials developed or distributed
- Participants served
- Hours of service provided
- Partnerships or coalitions formed
- Policy briefings conducted
- Lobbying sessions with public officials held
- Curriculum/curricula developed
Your Turn: ...

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Fasten your Seat Belts
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Logic Model Diagram:
Logic Model Example - Training Workshop Series

Intermediate-Term Outcomes
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08.17.12 Proteus Fund - Diversity Fellows - Logic Models Training
Logic Models Step by Step: Outcomes

Outcomes:
The changes expected to result from a program – changes among clients, communities, systems, or organizations

- So what? What difference does the program make?
- What does success look like?

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.)
Be Outcome Driven, Not Activity Driven!
Be Outcome Driven, Not Activity Driven!

Activity Driven

• To train and empower community volunteers

• To teach financial management skills to low-income families

• To engage at-risk youth in leadership development opportunities

• To organize annual conference for early-ed teachers on latest research and approaches

Outcome Driven

• Communities will have increased human capacity to deal with local issues

• Low-income families will be able to manage their resources better and become less dependent on the community

• Youth participants will learn new leadership and communication skills

• Early-ed teachers will know current research and apply it in the classroom
A Quick Test: Outputs or Outcomes?
The Four Dimensions of Outcomes

- Focus
- Scope
- Time/Chain of Outcomes
- Type of Change
## Outcome Dimensions: Focus

<table>
<thead>
<tr>
<th>Individual</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>E.g., child, parent, client, resident</td>
<td>- <em>Parents use alternative discipline approaches (behavior)</em></td>
<td>- <em>Children are better prepared to enter school (condition)</em></td>
<td></td>
</tr>
<tr>
<td>Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E.g., family, community, team</td>
<td>- <em>Improved communication among family members</em></td>
<td>- <em>Decreased neighborhood violence</em></td>
<td>- <em>Shift in authority and responsibility from traditional agencies to residents groups</em></td>
</tr>
<tr>
<td>Organizational</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E.g., agency, organization</td>
<td>- <em>Increased efficiency</em></td>
<td>- <em>Increased staff motivation</em></td>
<td>- <em>Increased collaboration with other organizations</em></td>
</tr>
<tr>
<td>Systemic</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E.g., early-education</td>
<td>- <em>Service integration or interagency resource sharing</em></td>
<td>- <em>Greater coordination among partners in a system</em></td>
<td></td>
</tr>
</tbody>
</table>
Outcome Dimensions: Scope

What is your program reach?

- **Geography** (people in Boston neighborhood; students attending XYZ 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)
## Outcome Dimensions: Types of Change

### Changes in Learning

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<tr>
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<th>Examples</th>
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</thead>
<tbody>
<tr>
<td>- New knowledge</td>
<td>- Participating new mothers increase their knowledge of child development</td>
</tr>
<tr>
<td>- Increased skills</td>
<td>- Teens ages 15-18 increase their commitment to community service</td>
</tr>
<tr>
<td>- Changed attitudes, opinions, or values</td>
<td></td>
</tr>
<tr>
<td>- Changed motivations or</td>
<td></td>
</tr>
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</table>

### Changes in Action

<table>
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<tbody>
<tr>
<td>- Modified behavior or practice</td>
<td>- Participating new mothers engage in developmentally appropriate child rearing practices</td>
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<tr>
<td>- Changed decisions</td>
<td>- Teens ages 15-18 participate in community service</td>
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<td>- Changed policies</td>
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### Changes in Condition

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<tr>
<td>- Human</td>
<td>- Children of participating new mothers are at their appropriate developmental stage</td>
</tr>
<tr>
<td>- Economic</td>
<td>- Decrease in unemployment rate among women participating in the program</td>
</tr>
<tr>
<td>- Civic</td>
<td></td>
</tr>
<tr>
<td>- Environment</td>
<td></td>
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Outcome Dimensions: Chain of Outcomes

**Short-Term**
What change do you expect to occur either immediately or in the near future?
- Achieved during program timeframe
- Within program control
- More Attributable to Program
- Easier to Measure

**Intermediate**
What change do you want to occur after that?
- Achieved at the end/beyond program timeframe
- Follow short-term outcomes

**Long-Term**
What change do you hope will occur over time?
- Achieved after program timeframe
- Outside direct program control
- Less Attributable to Program
- Harder to Measure

Time
Outcome Dimensions: Chain of Outcomes

**Short-Term**

*What change do you expect to occur either immediately or in the near future?*

- New knowledge
- Changed opinion/values
- Increased skills
- Changed motivation
- Changed attitudes
- Changed aspirations

**Learning**

**Intermediate**

*What change do you want to occur after that?*

- Modified behavior
- Changed policies
- Changed practices
- Changed social action
- Changed decisions

**Action**

**Long-Term**

*What change do you hope will occur over time?*

- Changed human condition
- Changed civic condition
- Changed economic condition
- Changed environmental condition

**Condition**

**Time**
Outcome Dimensions: Chain of Outcomes (Examples)

---

**Short-Term**

**LEARNING:** The knowledge parents and guardians gain from the literature & media.

- Increased understanding among targeted parents of the importance of childhood immunization
- Increased knowledge among targeted parents of where to go to have their children immunized

---

**Intermediate**

**ACTION:** The actions parents & guardians take as a result of that knowledge.

- Increased number of targeted parents who take their children to be immunized

---

**Long-Term**

**CONDITION:** The conditions that change as a result of those actions.

- Increased number of children of targeted parents who continue to receive up to date immunizations
- Healthier children

---

Time
Outcome Dimensions: Chain of Outcomes (Examples)

**Short-Term**

**LEARNING**
- Producers increase knowledge of water contamination risks
- Participants increase knowledge and skills in financial management
- Community increases understanding of childcare needs

**ACTION**
- Empty inner city parking lot converted to community garden

**Intermediate**

**ACTION**
- Unused wells are sealed
- Establish financial goals, use spending plan
- Residents & employers discuss options and implement a plan

**LEARNING**
- Youth & adults learn gardening skills, nutrition, food preparation & mgt.

**Long-Term**

**CONDITION**
- Improved water quality
- Reduced debt and increased savings
- Child care needs are met
- Money saved, nutrition improved, residents enjoy greater sense of community

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A Quick Test: What type of Outcome?
Connecting outputs to outcomes is a challenge

“I think you should be more explicit here in Step Two.”
## Activities-Outputs-Outcomes Worksheet

<table>
<thead>
<tr>
<th>Activities</th>
<th>Outputs</th>
<th>Short-term Outcomes</th>
<th>Intermediate Outcomes</th>
<th>Long-term Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>What happens in our organization?</em></td>
<td><em>What are the tangible products of our activities?</em></td>
<td><em>What changes do we expect to occur within the short term?</em></td>
<td><em>What changes do we want to see occur after that?</em></td>
<td><em>What changes do we hope to see over time?</em></td>
</tr>
</tbody>
</table>

|   |   |   |   |   |
## Outcomes Worksheet

<table>
<thead>
<tr>
<th>Focus</th>
<th>Scope</th>
<th>Type</th>
<th>Type</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Individual, Group, Organization, System)</td>
<td>(Who/What/Where)</td>
<td>(Learning, Action, Condition) + Change/ desired effect</td>
<td>In what</td>
<td>By when</td>
</tr>
<tr>
<td>Group</td>
<td>Families participating in the Family Resource Center</td>
<td>Action: increase</td>
<td>Their use of community resources &amp; services</td>
<td>Within one year of joining</td>
</tr>
<tr>
<td>System</td>
<td>School boards</td>
<td>Action: adopt</td>
<td>Policies to improve student nutrition &amp; physical activity</td>
<td>By December 2014</td>
</tr>
</tbody>
</table>
What are good Outcomes?

When selecting outcomes, think if they are:

1. **Important** – Which outcomes are the most important?
2. **Meaningful** – Which outcomes or benefits are meaningful for the participants or stakeholders?
3. **Realistic** – What is realistic given the nature of the problem and what can we expect to influence?
4. **Reasonable** – Which outcomes are reasonable considering our investment and what we did and whom we reached?
Which Outcome Would YOU Pick?

Example

1. Community volunteers will establish and facilitate parent support groups
2. Parent support groups will be established and function with the leadership of community volunteers
3. Parents will be better equipped to deal with their children through parent support groups that are facilitated by community volunteers
4. Parent-child relationships will be improved with the assistance of parent support groups that are facilitated by community volunteers
Issues in Defining Outcomes

- There is **no right number** of outcomes
- There may be more than one “**outcome track**”
- In some cases, immediate **outcomes** may seem like **outputs**
- The more **immediate** the outcome, the more **influence** the program has over its achievement
- The longer term the outcome, the less direct influence the program has over its achievement and the more likely other **extraneous forces** are to intervene
- Because other forces affect an outcome doesn’t mean it shouldn’t be **included**
- Long-term outcomes, however, should not go beyond the program **purpose** or **target audience**

*Source: United Way of America, 1996*
Unfasten your Seat Belts
“Life is what happens to you while you’re busy making other plans”

John Lennon
A Logic Model Framework

**Problem Statement:**
A description of the problem that a program seeks to solve

**Goal:**
The intended aim or impact over the life of a program

**Rationales:**
Why will program activities produce results?

**Assumptions:**
What factors necessary for program success are already in place?

**Resources:**
People, time, materials, funds dedicated to or consumed by a program

**Activities:**
The actions a program takes to achieve desired results

**Outputs:**
The tangible, direct products of program activities

**Outcomes:**
The changes expected to result from a program – changes among clients, communities, systems, or organizations

**External Factors:**
Other influences on program results; circumstances beyond program control

Source Innonet
Logic Models Step by Step: External Factors

Examples

- Political environment
- Economic situation
- Social/cultural context
- Geographic and other natural constraints
A Logic Model Framework

**Problem Statement:**
A description of the problem that a program seeks to solve

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Source Innonet
Check your Logic Model

1. Does it identify the most important needs of your chosen beneficiaries?

2. Does it articulate the most important leverage points to meet those needs?

3. Does it link your solutions to your beneficiaries’ needs through a logical chain of cause-and-effect relationships?

4. Is it empirically plausible, if not proven?
A Final Test
Learning Objectives

1. Know what a Logic Model is
2. Understand the relationship between Theories of Change and Logic Models
3. Learn how to use a Logic Model framework
4. Discuss the use of Logic Models for evaluation and learning purposes
After you create a Logic Model, use it

• To **Build Clarity** and consensus in your organization

• To **Communicate** with funders, potential clients, and media

• To **Evaluate** your work

• To **Learn** from your work
Logic Models can serve as the foundation for Evaluation plans
Results & Impact

Foundation Mission & Strategy

Plan

- Theories of Change
- Logic Models
- Narratives
- Work Plans
- Budgets
- Evaluation Plans
  - ...

Act

- Grantmaking
- Site Visits
- Convening
- Communications
  - Initiatives
  - Knowledge Dissemination
  - Partnerships
  - ...

Results & Impact
“We build the road and the road builds us.”
-Sri Lankan saying
A COMPASS IN THE WOODS:
LEARNING THROUGH GRANTMAKING TO IMPROVE IMPACT

MARILYN J. DARLING, SIGNET RESEARCH & CONSULTING, LLC
On-line References

- [www.uwex.edu/ces/lmcourse](http://www.uwex.edu/ces/lmcourse)*
  (online interactive course)
- [www.uwex.edu/ces/pdande](http://www.uwex.edu/ces/pdande)
- [http://www.cdc.gov/eval/index.htm](http://www.cdc.gov/eval/index.htm)
- [http://ctb.ku.edu/](http://ctb.ku.edu/)

* Key sources for this presentations