Using Logic Models to Monitor Progress

Western Canada SWIS Learning Event

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Objectives

1. What are logic models – a review and introduction

2. Creating a logic model – key elements

3. Using a logic model as a management tool

What is a Logic Model?

Logic models are an important foundation for developing an evaluation plan and for managing/monitoring an evaluation.

Usually the logic model is presented in a **visual format** and **explains the relationship** between what you are doing in the program with the resources consumed (inputs and activities) to the results you are getting (outcomes/results).

The aim is to avoid the '*labour of an elephant to produce a mouse!*" – spending time on activities that are not directly related to getting the outcomes intended.

Why Logic Models?

There are multiple advantages to developing and using a logic model including:

1. **Logic models integrate planning, implementation, and evaluation.** A logic model focuses program planners <u>to think more like an evaluator</u>. For staff who implement a project, the model answers practical questions about how the work will be organized and managed.

2. **Logic models prevent mismatches between activities and outcomes.** By connecting activities and outcomes, a logic model avoids proposing activities with no intended effect, or anticipating effects with no supporting activities. The focus is on outcomes and CHANGES to the current situation.

Why Logic Models?

3.   **Logic models enhance accountability by keeping stakeholders focused on outcomes.** All activities of a project need to be focused on the results of the project; logic models links activities (such as hiring staff, offering a training session, etc.) to what is expected as a result of such an activity.

4.   **Logic models help planners set priorities for allocating resources**. Even a well-funded project needs to make decisions on allocating resources; when planners are discussing options/setting priorities, a logic model can help make resource-related decisions in light of how the program's activities and outcomes will be affected.

Why Logic Models?

5. **Logic models reveal data needs and provide a framework for interpreting results.** With a logic model, program planners can identify outcomes/define measurable indicators and anticipate the data that needs to be collected.

6. **Logic models define a shared language and vision for change**. The terms used in a model help to standardize the way people involved in the project think and speak about the change expected. Logic models enhance communication with stakeholders and external audiences, such as the media or potential funders.

Logic Models

Project Processes (what the project does):

- ✓ Inputs - Resources (financial, human and physical) – the focus will be on
  - How was the program offered?
  - What enabled it (funding, staffing, clients, philosophy, tools)?
- ✓ Outputs - Activities
  - How will project activities unfold?
  - How will activities relate to their context?
  - How do we know that the activities occurred (what evidence is available?)
  - Lessons learned/promising practices

Logic Models

Project Outcomes (what happened as a result of the processes)

Immediate, medium and long-term outcomes (**changes** as a result of the processes, products, activities, tools offered through the project) that can be measured

- ✓ Always focus on the changes that happened, hopefully because of your program's activities

- ✓ How will the outcomes will be measured?
- ✓ How will data be collected?

Template for a Logic Model

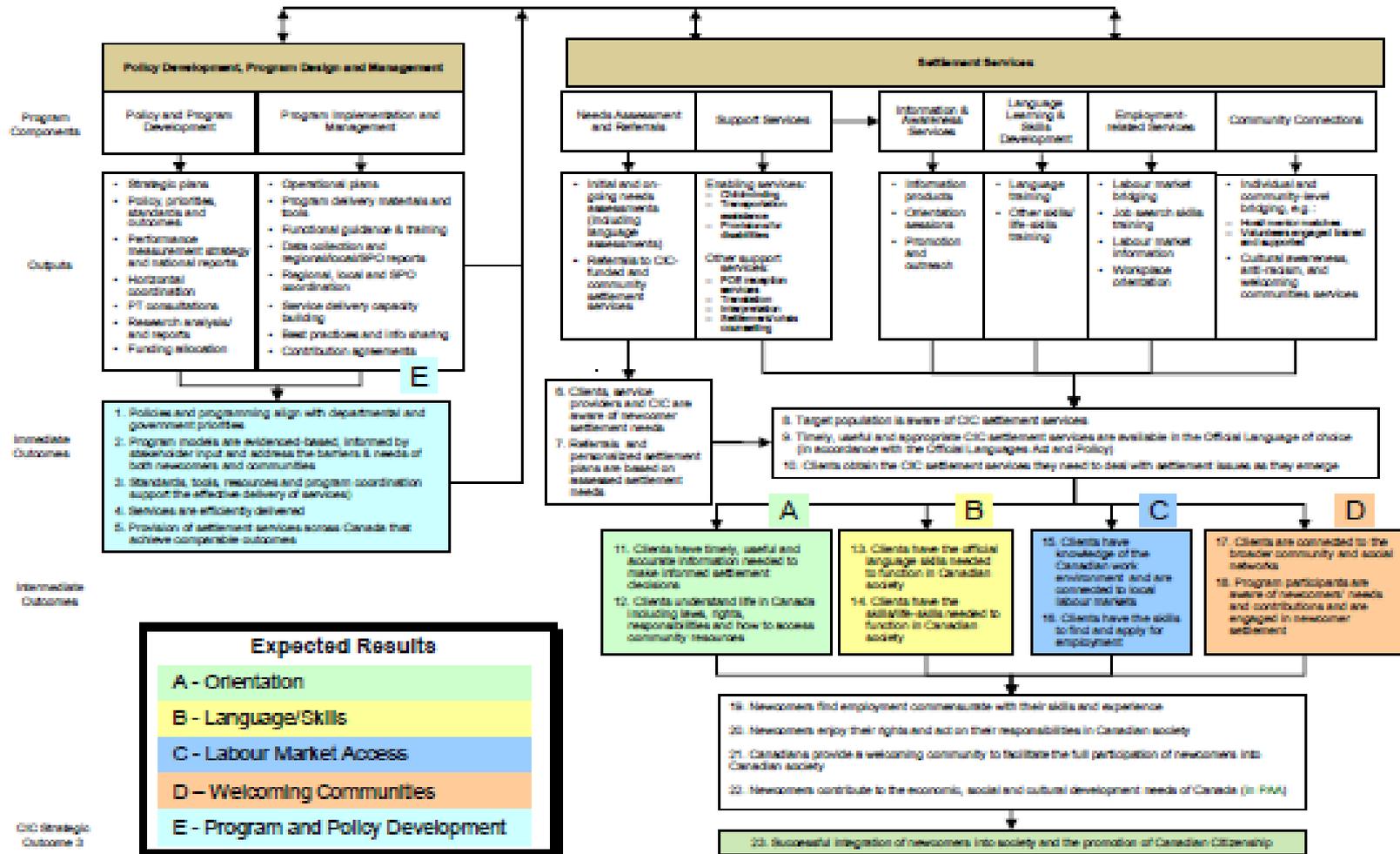| INPUTS	OUTPUTS		OUTCOMES (changes in knowledge, actions, conditions)			Often will have an another column that indicates how and when data will be collected to document the outcomes
	Activities	Participation	Short (1 to 1.5 years)	Medium (1 year to 3 years)	Long (3 years+)	

Logic Model for SWIS

Settlement services throughout Canada, usually funded by the federal government provide:

- ✓ Orientation
- ✓ Language/Skills
- ✓ Labour Market Access
- ✓ Welcoming Communities
- ✓ Policy and Program Development

SWIS is part of this larger program.

Settlement Program Logic Model

Policy Development, Program Design and Management

Settlement Services

Program Components

| Policy and Program Development | Program Implementation and Management | Needs Assessment and Referrals | Support Services | Information & Awareness Services | Language Learning & Skills Development | Employment-related Services | Community Connections |

Outputs

Policy and Program Development:
- Strategic plans
- Policy, priorities, standards and outcomes
- Performance measurement strategy and national reports
- Horizontal coordination
- PT consultations
- Research analysis/ and reports
- Funding allocation

Program Implementation and Management:
- Operational plans
- Program delivery materials and tools
- Functional guidance & training
- Data collection and regional/local/SPO reports
- Regional, local and SPO coordination
- Service delivery capacity building
- Best practices and info sharing
- Contribution agreements

Needs Assessment and Referrals:
- Initial and on-going needs assessments (including language assessments)
- Referrals to CIC-funded and community settlement services

Support Services:
- Enabling services:
  - Childminding
  - Transportation assistance
  - Provisions for disabilities
- Other support services:
  - PDB reception services
  - Translation
  - Interpretation
  - Settlement crisis counselling

Information & Awareness Services:
- Information products
- Orientation sessions
- Promotion and outreach

Language Learning & Skills Development:
- Language training
- Other skills/ life-skills training

Employment-related Services:
- Labour market bridging
- Job search skills training
- Labour market information
- Workplace orientation

Community Connections:
- Individual and community-level bridging, e.g.:
  - Host mentor matches
  - Volunteers engaged (aimed and supports)
- Cultural awareness, anti-racism, and welcoming communities services

E

Immediate Outcomes

1. Policies and programming align with departmental and government priorities
2. Program models are evidence-based, informed by stakeholder input and address the barriers & needs of both newcomers and communities
3. Standards, tools, resources and program coordination support the effective delivery of services
4. Services are efficiently delivered
5. Provision of settlement services across Canada that achieve comparable outcomes

6. Clients, service providers and CIC are aware of newcomer settlement needs
7. Referrals and personalized settlement plans are based on assessed settlement needs

8. Target population is aware of CIC settlement services
9. Timely, useful and appropriate CIC settlement services are available in the Official Language of choice (in accordance with the Official Languages Act and Policy)
10. Clients obtain the CIC settlement services they need to deal with settlement issues as they emerge

Intermediate Outcomes

A
11. Clients have timely, useful and accurate information needed to make informed settlement decisions
12. Clients understand life in Canada including laws, rights, responsibilities and how to access community resources

B
13. Clients have the official language skills needed to function in Canadian society
14. Clients have the skills/life-skills needed to function in Canadian society

C
15. Clients have knowledge of the Canadian work environment and are connected to local labour markets
16. Clients have the skills to find and apply for employment

D
17. Clients are connected to the broader community and social networks
18. Program participants are aware of newcomers' needs and contributions and are engaged in newcomer settlement

19. Newcomers find employment commensurate with their skills and experience
20. Newcomers enjoy their rights and act on their responsibilities in Canadian society
21. Canadians provide a welcoming community to facilitate the full participation of newcomers into Canadian society
22. Newcomers contribute to the economic, social and cultural development needs of Canada (in PAA)

23. Successful integration of newcomers into society and the promotion of Canadian Citizenship

CIC Strategic Outcome 3

Expected Results

- A - Orientation
- B - Language/Skills
- C - Labour Market Access
- D – Welcoming Communities
- E - Program and Policy Development

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Logic Model for SWIS

The <u>comprehensive</u> logic model for all settlement services provides the overarching directions and expectations for <u>all</u> the programs/services related to settlement services.

A logic model for <u>your locally delivered</u> program needs to relate to the comprehensive model and your activities and results MUST support the comprehensive logic model.

- You can't go off and do your own thing.

Logic Model for SWIS

The comprehensive logic model will provide directions on **general outcomes**.

For example – Intermediate outcomes for the <u>Welcoming Community</u> stream include:

- Clients (newcomers) are connected to the broader community and social networks

- Program participants (schools, other community resources) are aware of newcomers' needs and contributions and are engaged in newcomer settlement

- Canadians provide a welcoming community to facilitate the full participation of newcomers into Canadian society.

Your Challenge

To develop a logic model for your program to ensure that it:

- links to the comprehensive logic model (which is probably your main funder),

- supports the outcomes of the comprehensive logic model, and

- provides useful information to both your program and to your funder so that it can inform the entire approach of settlement services (meta-evaluations)

Getting to a Logic Model

Step One – Identify what you want your program to accomplish.

- Your logic model should reflect your program's objectives.

    - Remember that your program objectives could also include processes such as developing partnerships etc.

- You may need to flesh out your program's objectives by describing exactly what would be different at key points in time because of the activities of your program.

Getting to a Logic Model

Step Two – Clarify your outcomes

- Particularly which outcomes are short, medium and long term outcomes

- Don't overreach and claim that you will achieve hugely significant outcomes over a one year period

- **"What is going to be different because of your program?"**

- Connect your outcomes to research to support your approach; such as ERIC **http://eric.ed.gov**

Getting to a Logic Model

For example:

If one of your activities is to have one-on-one contact with families to introduce them to the school system, its resources, and how to use those resources – a short term outcome could be:

- ✓ After 3 months – all families have been contacted at least 2 times by a SWIS staff person to introduce them to available resources.

A longer term outcome could be:

- ✓ After 12 months - X number of families have used school resources during the school year to resolve an issue.

Getting to a Logic Model

Step Three – Make sure your outcomes are a direct result of your program activities.

By visually mapping the relationship between input/outputs (activities) and outcomes, it becomes apparent which activities may not be needed OR where additional activities or other inputs are needed.

You need to put your "critic hat" on during this step – really question if the outcome is something that would have happened without your program.

- For example maybe there is a well established network from the newcomer's country and they provide this type of information.

Example of Logic Model

Introducing families to school resources

INPUTS	OUTPUTS		OUTCOMES		
	Activities	Participants	Short Term (3 to 6 months)	Medium (6 months to 1 year)	Long (1 year plus)
$$ (cost of travel/ materials)

SWIS Staff (how many for how long?) | Meetings with school staff to identify contact information and menu of resources

Resource guide prepared (language?)

Contact with families

Other tasks TDB | SWIS staff

School staff

SWIS staff and translator

Families | All families have been provided with a minimum of 2, 1-on-1 sessions | All families know what resources are available and who to contact in the school system.

(example of program participants – schools – knowing the needs of newcomer's) | X number of families have used school resources at least once during the school year to resolve an issue *(example of clients being connected to the broader community and social networks – intermediate outcome from comprehensive logic model)* |

Getting to a Logic Model

Step Four – Confirm how each activity leads to each outcome

As outlined in steps 1 to 3, activities lead to short term outcomes, which lead to medium term outcomes which lead to long-term outcomes

Between short, medium and long-term outcomes identify the 'why' they are connected.

Key Elements of a Logic Model

Ok, so what?

Once you have determined the outcomes you anticipate from the activities and tasks, you need to document the results and outcomes.

- Direct documentation
- Indirect documentation including indicators

Key Elements of a Logic Model

Direct documentation – can count the results such as # of visits, # of materials distributed, # of families who contacted school for resources.

- Usually direct documentation is available through on-going reporting by the program.
- Likely applies to short-time and maybe intermediate-term outcomes.

Indirect documentation – if you cannot document the outcome directly through program records, you will need to collect <u>additional</u> information and indicators are often used.

- As the term suggests, an **indicator** is the specific evidence that needs to be collected in order to *indicate* the outcome is being achieved.

Key Elements of a Logic Model

Long term outcome:

X number of families have used schools resources at least once during the school year to resolve an issue.

Need documentation on:

How many families used school resources to resolve an issue? How many times?

Need to negotiate with the school to get this information – privacy concerns. Might be better to get it from families

Was the issue resolved? In what ways? How much could have been resolved given the scope of the activity?

Direct contact with families/school officials – interviews

Did the family use other resources (unintended outcomes)?

Direct contact with families - interviews

Key Elements of a Logic Model

Probably you will do interviews with families to document this outcome.

But…

- When will interviews be done?

- Who will do the interviews?

  - Does the interviewer need training on doing interviews?

- Who will write the interview guide (questions)?

- Who will analyze the data from the interview?

Implementing the Program and its Evaluation

The logic model leads to managing the evaluation by asking the questions in the previous slide and answering those questions.

One tool to monitor implementation is a work plan.

A work plan, lists in detail,

- the specific tasks,
- who is responsible/involved,
- any costs associated with implementation and
- staff time required to implement.

Example Workplan

Evaluation Outcome #1	Activities	Who	When	✓	Budget	Staff Time

Each outcome identified has the potential for evaluation and must be included in the work plan.

Refer to the handout for details.

Implementing the Program and its Evaluation

Both the logic model and work plan require time to prepare, but, other than staff time, usually no hard dollars are required.

BUT, without doing a logic model/work plan, it is easy to forget tasks associated with implementing the program.

For example – it takes time to prepare an interview guide (the questions you will ask during an interview) as well as time to conduct interviews and analyse data from interviews.

Too often these tasks are done at the last minute and it then becomes random, rushed and NOT an evaluation.

Implementing the Program and its Evaluation

By spending time up front to identify specific tasks, who will do those tasks (and do they have the skills and time), the implementation is smoother and there are <u>fewer unexpected</u> surprises.

In example, Coordinator A has a lot of work (about 5 to 6 weeks) for <u>1 outcome </u>associated with the program.

- ✓ Is this coordinator responsible for other tasks in the program or in the organization?

A reminder – a full-time staff person in SK has a maximum of 236 days available for work. In this example, Coordinator A has already consumed 30 days on <u>1 outcome</u>.

Implementing the Program and its Evaluation

Logic models are often developed in response to a requirement from a funder and then they are put on a shelf and only looked at when the final report is being submitted.

Similarly – if a work plan is created, it is often only referenced when a staff person is undergoing an annual performance review.

Both are no nos

Implementing the Program and its Evaluation

Both the logic model and work plan should be reviewed at *every meeting* where the program is being discussed – regular staff meetings, meetings with stakeholders etc.

This is the management function of implementing a program and its evaluation.

Adjustments may need to be made during the implementation of the project – some tasks will take longer than anticipated, some results may need to be revisited/revised along with the activities that support those outcomes.

Implementing the Program and its Evaluation

Also consider sharing your logic models (and results) with other SWIS programs,

- ✓ Much of what you are doing is similar (if not the same).
- ✓ Don't need to spend a lot of time creating something new to your program if others have already done it.
- ✓ Will need to adapt it to your specific situations/ stakeholders

Summary

Logic models explains the relationship between what you are doing in the program with the resources consumed to the results you are getting.

Usually a visual representation

Logic models

- Link program planning to evaluation
- Prevent mismatches between activities and outcomes
- Enhance accountability
- Help set priorities
- Identify data needs
- Communication tools

Summary

For nationally based programs there is usually a comprehensive logic model that illustrates how a program will achieve results

Local programs need to link the logic model for their programs to the comprehensive logic model.

Summary

Steps:

1. Identify what you want your program to accomplish

2. Clarify your outcomes

3. Make sure your outcomes are a direct result of your program activities

4. Confirm HOW each activity leads to each outcome.

Summary

Identify what data you need to document your outcomes

Develop a work plan to:

- assign responsibilities for activities/tasks,

- $$ associated with each activity, and

- staff time required to implement the activity.

Monitor both the logic model and work plan extensively to ensure you are on track.

Summary

For further assistance contact:

    Canadian Evaluation Society

    www.evaluationcanada.ca

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