Sail To Success with Project Planning Using Logic Models

SAIR Conference 2018

Presented By: Kelly Tillotson
Welcome!

• Institutional Knowledge Management – UCF
• IR Data Analyst
• Logic model project:
  • Evaluated an online training of a data collection system
Presentation Navigation

- Defining a logic model
- Benefit of use
- Parts of a logic model
- Evaluation Project
- Types of Design
Logic Model

• Logic Models define your plan!
• Road map
• Plan matrix
• Visual representation of your plan
Logic Model

Like a Google Map!
Logic Models Benefits

Logic Model

Inputs (1) → Activities (2) → Outputs (3) → Outcomes (4)

- Shorter Term
- Longer Term

Impact (5)
Logic Model Benefits

• Defining the plan can help the flow of process to result
• Helps to create an action plan that is actionable
• Assists with keeping tasks on track by showing how the parts fit together
• Visual way to communicate a plan!
• Supports evaluation process
Logic Model vs. Process Mapping

- Logic models depict the relationship between resources, activities, outputs and outcomes
- Process models depict what the business or process does
- Can be used together – logic model then process model
Parts Of a Logic Model
Inputs

- Resources
- What we are putting into the project

Examples:
- Funding
- Staff
- Materials
- Technology
Activities

• Events of the program
• Strategies
• Training, Workshops
• Meetings

• Examples:
  • Testing
  • Training
Outputs

• Products from activities
• Units of service

• Examples:
  • Number of participants that completed training
  • Quality of training/workshops
Outcomes

- **Short term** – Immediate effects such as weeks to months
  - Example: Changes in knowledge or skills

- **Medium** – Effects that occur months to years
  - Example: Changes in policies; behaviors over time

- **Long term** – Effects that occur over years
  - Example: Effects that continue to occur and change over years
Impacts

• Results of the actions taken
  • What happened? What were the results

• Effects on the intended audience
Project – Using a Logic Model

• IKM Data Analyst Team Task
  • New/updated data collection system
  • Required training users

• Organizing our training plan

• Keeping on track - a reference

• Defined outcomes evaluation
Project - Logic Model

• IKM Data Analyst Team
  • New data collection system
  • Required training users

• Project Evaluation
  • Making updates – Revised plan

• Organizing our training update plan

• Keeping on track - a reference
## Project - Inputs

<table>
<thead>
<tr>
<th>Inputs (What we invest)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
</tr>
<tr>
<td>- Data collection system</td>
</tr>
<tr>
<td>- Computer resources</td>
</tr>
<tr>
<td>- Software</td>
</tr>
<tr>
<td>- Training/screen capture</td>
</tr>
<tr>
<td>- Audio Editing</td>
</tr>
<tr>
<td>- Training materials (PDF)</td>
</tr>
<tr>
<td>Staff</td>
</tr>
<tr>
<td>Trainers</td>
</tr>
</tbody>
</table>
## Project - Outputs/Activities

<table>
<thead>
<tr>
<th>Outputs</th>
<th>Activities</th>
<th>Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Use/Testing</td>
<td>- Data Analysis Team</td>
<td>Focus Group Volunteers</td>
</tr>
<tr>
<td>- Data Analysis Team</td>
<td>Training Focus Group</td>
<td>IKM Data Analyst Team</td>
</tr>
<tr>
<td>- Volunteer System Users</td>
<td>Online System Training</td>
<td>University Faculty and Staff</td>
</tr>
<tr>
<td>Communication to Users</td>
<td></td>
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<tr>
<td>Training Resource Development/</td>
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<tr>
<td>Implementation</td>
<td></td>
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<td>Feedback from Users</td>
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</table>
# Project - Outcomes/Impacts

<table>
<thead>
<tr>
<th>Outcomes – Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>(The incremental events/changes that occur as a result of the outputs)</td>
</tr>
<tr>
<td><strong>Short</strong></td>
</tr>
<tr>
<td>All new FAS users will complete the online training and pass the quiz.</td>
</tr>
<tr>
<td>Users understand how to use the system (Limited questions to FAS support email, limited errors on completed forms)</td>
</tr>
<tr>
<td>Resource material being utilized (Handbook and tutorials in SharePoint)</td>
</tr>
<tr>
<td>System initiators can effectively support their system approvers and faculty regarding questions about forms and process.</td>
</tr>
<tr>
<td>Feedback from users</td>
</tr>
<tr>
<td>Completion of state reporting.</td>
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</table>
## Project - Logic Model

**IKM 410 Training:** Faculty Activity System (FAS) Online Training

**Situation:** The Faculty Activity System was newly built in the PeopleSoft system, and staff and faculty users that initiate forms need to be trained on how to use it.

### Inputs (What we invest)

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### Outputs (What we do and who we do it to)

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<tr>
<th>Activities</th>
<th>Participation</th>
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</table>

### Outcomes – Impact

**Short**

- All new FAS users will complete the online training and pass the quiz.
- Users understand how to use the system (Limited questions to FAS support email, limited errors on completed forms).
- Resource material being utilized (Handbook and tutorials in SharePoint).
- System initiators can effectively support their system approvers and faculty regarding questions about forms and process.
- Feedback from users.
- Completion of state reporting.

**Medium**

- Per semester review of questions and inquiries to FAS Support to examine potential user challenges.
- Training updates identified, outlined and implemented per semester as needed.
- Resource material reviewed and updated as well as renewed marketing to remind users of available resources.
- Ongoing review of training survey feedback.
- Completion of state reporting.

**Long**

- Continued use of FAS training with annual review/evaluation for updates and/or changes.
- Per semester review of questions and inquiries to FAS Support to examine potential user challenges.
- Resource material review and updates.
- Ongoing review of training survey feedback.
- Completion of state reporting.

### Assumptions

- Faculty and staff registering for the online training will have already taken PeopleSoft Basics course.

### External Factors

**Logic Model Template Example**

**LOGIC MODEL**

**PROGRAM NAME:**

**PROGRAM GOAL (S):**

**RESOURCES/INPUTS:**

*What resources do we need to achieve our goals?*

<table>
<thead>
<tr>
<th>OUTPUTS</th>
<th>OUTCOMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities</td>
<td>Audience(s)</td>
</tr>
<tr>
<td></td>
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### Program Logic Model Worksheet

<table>
<thead>
<tr>
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<th>Outputs</th>
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<tbody>
<tr>
<td></td>
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<td></td>
<td>Initial</td>
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<td></td>
<td>Intermediate</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Long-term</td>
</tr>
</tbody>
</table>

Logic Model Template Example
Logic Model Template Example

Program Action – Logic Model

**Inputs**
- What we invest
- Staff Time
- Volunteer hours
- Planning Time
- Money
- Knowledge base
- Expertise
- Materials
- Equipment
- Space
- Technology
- Partners
- Priorities
- Mission
- Vision
- Values
- Mandates
- Resources
- Local dynamics
- Collaborators

**Outputs**
- Who we reach
- Existing Contributors
- New Contributors
- Clients
- Educators
- GLAMs
- Decision-makers
- Consumers
- What we do
- Develop products, curriculum, resources
- Deliver content and services
- Conduct workshops, and meetings
- Train
- Counsel/Advise
- Facilitate
- Partner
- Disseminate/Work with media
- What we create
- Plans
- Event Documents
- Topic Areas
- Pages
- Articles
- Templates

**Outcomes - Impact**
- Short term
- Intermediate
- Long-term
- Results in terms of Learning
- Awareness
- Knowledge
- Attitudes
- Skills
- Interest
- Opinions
- Aspirations
- Intentions
- Motivations
- Results in terms of changing Action
- Behavior (i.e. participation, retention)
- Practice/Contributions (i.e. articles, pictures, bytes, edits, etc.)
- Decision-making (i.e., program planning, gap analysis, next steps)
- Policies
- Social Action
- Results in terms of change to the Conditions
  - Social (i.e., Reach, Participation, Diversity)
  - Economic (i.e. more funding for programs, more cost effective programs)
  - Civic (i.e., Reach, Community engagement)
  - Environmental (i.e., Article and Photo Quality, Expansion of Content)

**Evaluation**
- Identification – Design – Implementation – Completion/Follow-up


Tips to Consider

• Simple, short, one page
• Easy to read
• Models can be adjusted to fit your needs
• Start at either end - Inputs or Outcomes
• Program Creation or Program Evaluation
Thank you for attending!

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References
