Logic Model Formulation Workshop

Transformational Grants

March 4, 2020

THE COMMUNITY FOUNDATION FOR McHENRY COUNTY

AN AFFILIATE OF THE CHICAGO COMMUNITY TRUST

Agenda

- Reminders
- Next Steps: Application & Presentation
- Selection Process and Evaluation Criteria
- Creating a Logic Model
  - Supporting documents
- Things to Consider
- Questions

REMINDERS:

Transformational Grants

- Designed to support a bold idea, new or current, that will result in measurable solutions to identified community problems.
- Transformational Grants must be consistent with the mission, values and priorities of the applicants and The Community Foundation.

REMINDERS:

Proposals Must Demonstrate:

- How the project addresses identified community need(s).
- How the project will measurably impact the issue(s) it addresses.
- How a communications strategy for the funded project will be implemented.
- A credible plan for goal sustainability.
- The project will serve the residents of McHenry County.

REMINDERS:

Timeline

2020 Transformational Grant Cycle

April 1, 2020	**Application Due**
April 21, 2020	**Projects Presented to Board of Directors (By invitation only)**
April 24, 2020	**Grant Recipients Notified**
Week of June 1, 2020	**Check Distribution Site Visits**

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REMINDERS:

IMPORTANT!

- **LATE OR INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED.**

Next Steps:
Application & Presentation

- Complete the application and all supporting documents through GrantCentral.
- Selected finalists will be invited to present to The CFMC’s Board of Directors.
- Presentations will consist of:
  - Five minute presentation by applicant.
  - Five minute Q&A about project with The CFMC’s BOD.
- Presentation should include:
  - Summary of need.
  - Project summary.
  - Amount of funding requested.
  - How project relates to the goals of Transformational Grants/How project will be transformational for McHenry County.

Selection Process

- Application:
  - The CFMC's Grant Committee and Board Members review applications and make recommendations for finalists.
- Presentation:
  - The CFMC's Board of Directors will view presentations, consider all components, and vote on grant recipients.

Criteria

- Financial health, leadership and governance of the lead organization or its fiscal agent.
- Indication of project sustainability beyond this grant opportunity.
- Alignment with Transformational Grant goals, values and priorities.

Evaluation Criteria

1. Need	• What is the need you will be addressing? • Who will you be serving in McHenry County? • How will your project/program change McHenry County?
2. Collaboration	• Who will you be partnering with in the community to address this need? • Do you have demonstrations of partnerships (letters of support from all collaborators on their official letterhead, multiple funding sources, etc.)?
3. Innovation	• How does your project/program differ from solutions that have been approached in the past? • Has your organization taken a creative approach to developing opportunities based on research and best practices?
4. Measurable Outcomes	• What metrics will you use to support the work and show positive impact in McHenry County? How did you find your baseline metrics? • How will you collect impact data (i.e. outputs, outcomes)? • Does your data go beyond process/activities (number of participants, etc.) to show true impact?
5. Community Visibility	• How will you be sharing your proposed project/program with the community to encourage support, future funding opportunities, and project/program sustainability? • How will you connect with your project's target population?

Developing a Logic Model

"This model provides a road map of your program,
highlighting how it is expected to work,
what activities need to come before others,
and how desired outcomes are achieved."

W.K. Kellogg Foundation Logic Model Development Guide

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Supporting Documents

1. Measures of Progress
2. Activities & Milestones
3. Logic Model

Tip: *Develop supporting documents in this order!*

Measures of Progress Chart

Measures of Progress/Outcomes Tracker

Organization Name:

Project Name:

Instructions

1. Define up to three outcomes for the project or the organization aligned with the funding opportunity. As a reminder, these outcomes may not be achieved during the time of the grant. Outcomes should be tied to your
2. Determine approximately 5 or fewer Measures of Progress that correspond to the outcomes. Input them in the "Measures of Progress" column. Align Measures of Progress and associated targets with the timeframe of
3. Only include Measures of Progress that are measurable and reportable during the time period of the grant. Note: You will be asked to report on progress made against these Measures. Multi-year grants will include an
4. Data sources may include, but are not limited to, pre- and post-surveys, focus groups, interviews, administrative data, financial reports. Please be specific on your data collection methods.
5. Be as detailed as necessary - do not worry about making everything visible on the chart.

Outcome(s)	Measure of Progress	Baseline	Actual FINAL REPORT ONLY	Data Source and Data Collection Method	Comments
[Example] Increase the capacity of small business to use and apply fundamental business skills and tools to increase revenue, maximize savings, and enhance sustainability	[Example] Increase by 50% the number of small business owners SBOs) receiving supports from Business Service Organizations who demonstrate fundamental business finance skills and use tools for growth	Of the 20 SBO cohort participants, 3 currently report possessing the knowledge and skills for using business financials. Of the 20 SBO cohort participants, 4 report having financial recordkeeping processes and accounting tools.		Pre- and post-assessment of knowledge and skills capacity; Peer and Mentor ratings of demonstrated knowledge and skills capacity; Self-report of financial recordkeeping processes and accounting tools	

Measures of Progress Chart

- Read the Measures of Progress explanation on GrantCentral.

- Outcomes:
  - List the anticipated outcomes of your project. Be specific.
    - Increase, decrease, or stay the same.

- Measure of Progress:
  - What progress do you expect to be made on this outcome because of your project?

Measures of Progress Chart

- Baseline:
  - What is the baseline for this outcome?

- Actual:
  - *Filled in during final report only!*
  - What progress was actually made toward this outcome between the baseline and completing this project?

Measures of Progress Chart

- Data Source and Data Collection Method:
  - How were your baseline and actual measures of progress found/collected?
  - How are you monitoring your project's results? Be specific on your data collection methods.
    - Ex: Pre- and post-surveys, focus groups, interviews, administrative data, financial reports, etc.
  - What tools or sources are you using?

- Comments:
  - Add comments pertinent to understanding the outcome, it's importance, etc.

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Activities and Milestones Chart

Activities and Milestones

Organization Name:
Project Name:

Instructions

This plan should present a high-level snapshot of activities that will be undertaken during the grant period. It should concisely outline the timeline of activities and output(s)/milestones. Providing enough detail to understand the plan, while still being succinct. Click on the column titles for further instructions.

1. Provide a short description of Primary and Sub-Activities and Target Outputs and/or Milestones (tangible work products).
2. Mark the anticipated year/quarter an activity will take place by placing an X.
3. Add or delete rows and columns as needed to accommodate planned activities and anticipated grant term. Only fill in the years relevant to anticipated grant term. For example, for a one-year grant, fill in the Year 1 columns and delete the columns for Years 2 and 3.

Activity	Year 1				Year 2				Year 3				Target Outputs or Milestones	Comments
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
[EXAMPLE] Primary Activity 1: Non-Profit Capacity Building Trainings	X	X	X	X									75 staff and leaders complete training	
[EXAMPLE] Sub-activity 1.1: Establish development team to create materials.	X													
[EXAMPLE] Sub-activity 1.2: Develop training materials		X	X										Training handbook created	Grantee will consult with stakeholders to create training materials.
[EXAMPLE] Sub-activity 1.3: Provide training			X	X									75 staff and leaders complete training	Trainers likely recruited from NPO with expertise in capacity building.
Primary Activity 2														
Sub-activity 2.1														
Sub-activity 2.2														
Primary Activity 3														
Sub-activity 3.1														
Sub-activity 3.2														

Activities and Milestones Chart

- Activity:
  - What primary activity will you complete to move your project forward?
  - What sub-activities will it take to complete this action?

- Year/Quarter:
  - When will you accomplish this action/these sub-actions?
    - Consider Year 1 to be the grant period.
    - Provide information on the entire project, so we can get a sense of the project as a whole. Focus on the grant period.

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Activities and Milestones Chart

- Target Outputs or Milestones:
  - List the target outputs of the activity.
  - List any important milestones.

- Comments:
  - Include comments as needed to fill in details about the activity.

Logic Model

Logic Model

Organization Name:
Project Name:

Instructions

This plan should present a high-level snapshot of activities that will be undertaken during the grant period and the outputs, outcomes, and impact those activities will have on the community.

Provide enough detail to understand the plan, while still being succinct. Click on the column titles for further instructions.

1. Provide a short description of the Resources needed, anticipated Activities (related to the primary activities in the Activities and Milestones chart), Outputs, Short- & Long-Term Outcomes, and Impact.

2. Mark the anticipated year/quarter an activity will take place by placing an X.

3. Add or delete rows and columns as needed to accommodate planned activities. Show information for the entire project, so we can get a sense of the project as a whole. Consider Year 1 to be the grant period for The CFMC's 2020 Transformational Grants. You may delete the columns for Years 2 and 3 if not needed.

Resources	Activities	Year 1				Year 2				Year 3				Outputs	Short- & Long-Term Outcomes	Impact
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4			
In order to accomplish our set of activities, we will need the following:	*In order to address the need, we will accomplish the following activities:*													*We expect the following services delivery as a result of accomplishing these activities:*	*We expect that, if these activities are accomplished, we will see the following changes in 1-3 then 4-6 years:*	*We expect that, if these activities are accomplished, we will see the following changes in 7-10 years:*

Logic Model

- Resources:
  - What do you need in order to accomplish your set of activities?
    - Include: People (FTE/PTE staff, volunteers), collaborators, funding, organizational and community resources, etc.

- Activities:
  - What needs to happen in order to address the need?
    - These activities are used to bring about the intended program changes or results.
  - *Use the "Primary Activities" from your Activities & Milestones chart!*

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Logic Model

- Year/Quarter:
  - When will this be accomplished?
  - *Use the "Year/Quarter" from your Activities & Milestones chart!*

- Outputs:
  - What service delivery occurred as a result of accomplishing these activities?
  - *Use "Outputs" from Your Activities & Milestones chart!*

Logic Model

- Short- & Long-Term Outcomes:
  - If these activities are accomplished, what changes do we expect to see in:
    - Short-Term: 1-3 years
    - Long-Term: 4-6 years
  - *Use "Outcomes" and "Measure of Progress" from your Measures of Progress Chart!*

- **Impact:**
  - If these activities are accomplished, what changes do we expect to see in 7-10 years?
  - How has the community changed because of your project?

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Logic Model

- Logic Model Checklist:
  - Use this to help ensure your Logic Model is complete and reasonable.
  - *Does not need to be turned in with your Logic model.*

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Logic Model Checklist

	Logic Model Quality Criteria	Yes	Not Yet	Comments/Revisions
1	Major resources needed to implement the program are listed.	☐	☐	
2	Resources match the type of program.	☐	☐	
3	Major activities needed to implement the program are listed.	☐	☐	
4	Activities are clearly connected to the specified program goals.	☐	☐	
5	All activities have sufficient and appropriate resources.	☐	☐	
6	A variety of audiences across various regions of the county are taken into consideration when specifying credible outputs, outcomes, and impacts.	☐	☐	
7	Target participants and/or partners are described and quantified as outputs (e.g. 100 teachers from 5 rural high schools).	☐	☐	
8	Events, products, or services listed are described as outputs (e.g. 30 farmers will participate in at least 3 sessions of program, or curriculum will be distributed to at least 12 agencies).	☐	☐	
9	The intensity of the activities are appropriate for the type of participant targeted (e.g. higher-risk participants warrant higher intensities).	☐	☐	
10	The duration of the activities are appropriate for the type of participant targeted (e.g. higher-risk participants warrant longer duration).	☐	☐	
11	Outcomes address awareness, attitudes, perceptions, knowledge, skills, and/or behavior of participants.	☐	☐	
12	The outcomes are written as change statements (e.g. things increase, decrease or stay the same).	☐	☐	
13	The outcomes are specific, measurable, action-oriented, realistic, and timed.	☐	☐	
14	Outcomes reflect reasonable, progressive steps that participants can make toward longer-term results.	☐	☐	
15	Outcomes are within the scope of the program's control or sphere of reasonable influence.	☐	☐	
16	The outcomes are achievable within the funding and reporting periods specified.	☐	☐	
17	The impact, as specified, is not beyond the scope of the program to achieve.	☐	☐	

Checklist based on W.K. Kellogg Foundation's Logic Model Development Guide.

Let’s Try an Example

- Organization: Music for Babies
- Program: An Introduction to Instruments

Think About Impact

OUTPUTS	+	OUTCOMES	=	IMPACT
Numbers		Context		Mission Advancement
Statistics		Answers: “So What?”		

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Submitting Supporting Materials

- Measures of Progress
  - Upload in the “Learning and Outcomes” section.
- Activities & Milestones
  - Upload in the “Project Details” section.
- Logic Model
  - Upload in the “Additional Documents” section.

Things to Consider

- Budget:
  - Up to 25% of grant funding may be used for general operating expenses.
  - McHenry-specific budget
- Collaboration:
  - Include a list of collaborating agencies and how they will contribute to the project.
    - Clearly indicate which organization will be leading the project.
  - MUST include a letter of support from each collaborator on their official letterhead.
    - You can add or edit collaborators, and add letters of support at this point.

Things to Consider

- Sustainability:
  - How will you raise additional funds for your project, if needed?
  - How will the project be financially sustained going forward, if needed?
- Community Impact:
  - Must have measureable outcomes and demonstrate a transformative impact on McHenry County.
    - How will you measure outcomes?
    - What is your baseline and how was it determined?
    - How will your project be truly transformational?
  - How will you inform the community about your project?
  - How will your project have a countywide impact?
  - How will your project strengthen economic opportunity in the community?

Still Need Help?

Reach out!

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Questions?

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