Logic Model Formulation

Workshop

Transformational Grants
March 4, 2020
Agenda

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 1, 2020</td>
<td>Application Due</td>
</tr>
<tr>
<td>April 21, 2020</td>
<td>Projects Presented to Board of Directors (By invitation only)</td>
</tr>
<tr>
<td>April 24, 2020</td>
<td>Grant Recipients Notified</td>
</tr>
<tr>
<td>Week of June 1, 2020</td>
<td>Check Distribution Site Visits</td>
</tr>
</tbody>
</table>

**REMINDERS:**
• 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
Tip: Develop supporting documents in this order!

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

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 the grant.

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.

4. Multi-year grants will include an annual update.

5. 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.

6. Be as detailed as necessary - do not worry about making everything visible on the chart.

<table>
<thead>
<tr>
<th>Outcome(s)</th>
<th>Measure of Progress</th>
<th>Baseline</th>
<th>Actual FINAL REPORT ONLY</th>
<th>Data Source and Data Collection Method</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Example) Increase the capacity of small business to use and apply fundamental business skills and tools to increase revenue, maximize savings, and enhance sustainability</td>
<td>(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</td>
<td>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.</td>
<td>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</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.
# Activities and Milestones Chart

## 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.

## Activities and Milestones

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

**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 or 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 Foundation’s 2020 Transformational Grants. You may delete the columns for Years 2 and 3 if not needed.

<table>
<thead>
<tr>
<th>Resources</th>
<th>Activities</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Outputs</th>
<th>Short- &amp; Long-Term Outcomes</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>In order to accomplish our set of activities, we will need the following:</td>
<td>In order to address the need, we will accomplish the following activities:</td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
<td>Q1</td>
<td>Q2</td>
</tr>
</tbody>
</table>
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!
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?
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.
Let’s Try an Example

- Organization: Music for Babies
- Program: An Introduction to Instruments
Think About Impact

OUTPUTS + OUTCOMES = IMPACT

OUTPUTS:
- Numbers
- Statistics

OUTCOMES:
- Context
- Answers: “So What?”

IMPACT:
- Mission Advancement
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 measurable 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?
Reach out!

Kelsey Podgorski, Program Manager
815-338-4483
Kelsey@thecfmc.org
TheCFMC.org
Questions?