



Programmed for Success: Designing and Delivering Better Programs

**A Training Workshop for Program
and Grant Professionals**

January 19, 2008



Goals of Training

After the training, participants will be able to:

- Recognize elements of successful project design and delivery.
- Understand the characteristics of effective project management.
- Understand the role of evaluation in projects.

Introductions

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**Welcome to the
Genie in a Bottle
Foundation.**

**Tell us the four most
important reasons why we
should grant your wish and
fund your project.**

Program Theory Logic Model

Need → Resources → Activities → Outputs → Outcomes

Why you are doing the project

The human, financial, organization and community resources available for the project

Staff, supplies, money; also called inputs

What the project is going to do; the work or services of the project

Process results, such as products, number of people served, accomplishments

What changes occur because of the project

It's all about change.

- Every program seeks to change something or someone.
- What does your program or project intend to change?
- What is the chain of events that is causing the change?
- How will you know change has (or has not) occurred?

Some Common Challenges in Trying to Get Funded

- Misreading the odds
Gauge the competition.
- Your vision vs. funder requirements
Balance your vision with funder's.
- Not assimilating RFP contents
Take time. Don't rush. Get help.
- Biting off more than you can chew
Promise only what you can deliver.

Tips on Getting Funded – Weighing Your Prospects

- Check funder funding patterns – what and who has been funded already, how much \$, how many.
- Check funder web pages and published resources.
- Contact funder representatives. Build a relationship. Ask about your chances.
- Know what you can't control (funder preferences, funder biases).

Tips on Getting Funded – Proposal Basics

- Align proposal with RFP and proposal evaluation criteria
- Explore and detail what is novel yet replicable in your project.
- Use anecdotal information carefully.
- Avoid *excellent, unique* adjectives.
- Use data from previous project to justify continued funding *with a difference*
- Align budget and rationale

Tips on Getting Funded – More Proposal Basics

- Make sure your organizational information current and available [501(c)(3), annual report, audited financials].
- Establish capacity and address weaknesses with collaborations, advisory group(s), expert counsel, selected contractors.
- Include sustainability efforts.
- Include dissemination efforts.

Some Common Challenges in Designing a Program

- Where's the need?
- Illogical logic model – missing pieces
- Confusing outcomes with activities, resources, outputs
- Too much or too little staffing
- Promising too much.
- Not connecting need, activities, and outcomes
- Management Plan/Organizational Chart

Collaborations

- Many funders require or expect collaborations across organizations.
- Take care in not confusing partnership with service delivery.
- Establish what organizational change is expected to occur.

Advisory Groups

- Can support and strengthen project team
- Add expert advice and counsel
- Demonstrate seriousness of effort to funder
- Beware the symbolic and unutilized advisory group
- Keep it small
- Include in budget.

Goals, Objectives and Benchmarks

Measurable Outcomes

Goals, Objectives and Benchmarks Samples

- Classify each statement as to goal, objective, or benchmark.
- Operationally define each from your experiences with these statements.

Goals

General statement describing the ultimate result desired.

Short-term (achievable in a few months)

Long-term (achievable over several years).

Objective

- Statements expressed in measurable terms that are outcomes of the program.
- Not activities or action steps.
- These are used to design the outcome evaluation.



Benchmark

An expression focusing on what is to be achieved by an intermediate time to reach the ultimate objective.

Using Goals and Objectives

- Proposals – Align with Funder's goals/objectives; align with organization's goals/objectives.
- Programming – Basis for all you should be doing. Revisit often.
- Implementation – Inform design to produce desired goals/objectives.
- Reporting – Organizing elements for your report.

Exercise – Goal and Objectives

For your project, write at least one goal and one or two measurable objectives.

Discussion – Goals and Objectives

Share some

Difficulties

Cautions

Developing the Work Plan

How do we meet the objectives?

- Design new projects
- Repeat projects
- Copy other programs



Don't Forget

Systems are designed for the outcomes they produce.

To change the outcome, you must change the system.

How can objectives help you change the system?

Objectives and Design

- You can select activities that are
 - Research-based
 - Required by funder
 - Used by program previously
 - Familiar to staff

Are they aligned with the objectives?

Criteria for Aligned Activities

- Grounded in literature
- Research-based activity (What Works Clearinghouse, SAMHSA)
- Components are researched – put together in unique way
- Produce similar results to those you want

Examples

- Change in knowledge
 - 6. The *Don't Stop!* program will increase participant's understanding of the effects of movement on learning.
- Look for research on
 - How people learn
 - Brain research
 - Motivational Research
 - Group learning
 - Constructivism

Examples (Continued)

○ Change in Behavior?

- 5. Participants in the *Stop It!* treatment group will reduce destructive behavior compared to those participants in the comparison group.

○ Change in Attitude?

- Participants will have a positive attitude toward the arts after participation in the project.

Objectives and Implementation

- Objectives are often forgotten or overlooked during implementation
 - Focus is on implementation
 - Decision-making process doesn't consider objectives
 - Evaluation is missing
 - Management team is expert so doesn't need to revisit objectives
 - Life happens

Revisit Objectives

Implementation – Is what we are doing producing what we thought it would?

Decision-making – If we change this part are we changing focus?

Data-collection – Are we getting the data that informs us about outcomes?

Select an Activity for One of Your Objectives

Select and describe an activity that aligns to one of your objectives

Justify why you chose that activity –
How will it produce change or meet the objective?

On what is it based?

Tracking and Proving Your Success

- Data are *everything* that records what you do and what it accomplishes.
- Data tell you what is working and what isn't working.
- Data provide the only proof you have done your job.

Tips: Data Collection Made Easy (Well, Easier)

- Data planning starts with project planning.
- Include evidence of activities (formative or process) and achievement in meeting intended outcomes (summative)
- Share data collection chores but maintain control and include data quality measures.
- Building in the time and effort: \$
- Watch your Ns.

Common Data Collection Tactics

- Sign-in sheets to prove attendance, collect information
- Journals or portfolios to record work and growth
- Pre- and post-testing to assess gains in knowledge
- Observation.
- Surveys and questionnaires to assess change in attitude, knowledge, self-reported behaviors.
- In-Person, On-Line, Telephone, Recorded Media
- Focus Groups and Case Studies

How Do I Put My Data Together?

- MS Excel spreadsheets can handle many needs.
- Plan your formats before data arrive.
- Tailor data input to how you want to use the data.
- Seek expert assistance if possible.

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- Think of one data collection method for your objective and activity

How Do I Analyze My Data?

- Seek expert assistance if possible.
- Descriptive statistics are a good start.
- Be careful with overstating your evidence.
- Use measures that align with your objectives, intended outcomes, benchmarks.
- Keep measures of change in mind.

The Role of Human Subjects

- Include human subjects measures in your proposal.
- Know requirements and obtain necessary approvals.
- Working with Institutional Review Boards.
- The primary priorities of respect, beneficence, justice

Human Subjects and Your Projects

- Voluntary Participation
- Informed Consents (and Assents)
- Privacy and Confidentiality
- Coding Data/Removing Personal Identifiers
- Rewards and Benefits of Participation

What Do I Do With My Data?

- Ad hoc analyses and internal reports
- Formal reports to funder
- Presentations (and budgeting for them)
- Your project or organizational web site
- Papers and publications

Reporting

- Tell your story
- Revisit and organize around your objectives
- Tell about serendipitous findings

Reporting Format

- Funder requirements
- For longer evaluations, executive summary
- Highlight findings and unique discoveries

Importance of Negative Effects

- Tells what doesn't work
- Informs the field about what NOT to do
- Helps focus on areas that may produce more positive results
- It's OK – really!

Management of Three Phases of a Project

- Start up
 - Gear up multiple components
 - Staff must be in place & familiar with plan
- Full implementation
 - Watch for and document deviations
 - Get new staff updated quickly
- Winding down
 - Fatigue
 - Diffusion of focus

Tips: Managing the Project

- Everything returns to the project plan
- Select and hire appropriate staff for each task
 - Who collects and manages data?
 - Who coordinates with collaborators?
 - Who sets meetings?
 - Who keeps track of schedules?
 - Who has the authority/responsibility?

Tips: Managing the Project (Continued)

- Communications plan – internal and external?
 - Projects have collapsed without it
- Set deadlines and hold staff to them
 - Delays affect all aspects of program
- Revisit the objectives and plan often
- Use evaluator input

Tips: Managing the Unexpected

- If structure and process are in place do status checks – more frequently at beginning
- If authority is not set and understood, things break down – commitment by decision-makers to the plan
- Checking benchmarks provide indications of meeting objectives

Tips: Areas Where Things Can (And Will) Go Wrong

- Staff turnover
 - Clear job descriptions
 - Cross-training
 - Timely hiring
- Attrition/entropy
- Organizational support
 - Changes in partnership commitment
- Delays in payments from funder
- Weather

More...

- Outcomes
 - Negative results
 - Outcomes not what you expected
- Reporting
 - Remembered at last minute – if then
 - Whose job is it?

Evaluation

- More often required by funders
- What is it?
 - Assessment?
 - Research?
 - *Evaluation*
- Internal vs. External
 - Pros and Cons

Why Evaluate?

- Provides objective feedback for program improvement
- Provides feedback on program implementation – what did you do, exactly?
- Funders are requiring more stringent models than previously

Real Evidence of Outcomes and Change: Range of Approaches

- The “Gold Standard” of Randomized Control Trials
- Quasi-Experimental Models
- Comparison Groups
- Change within Treatment Group Only
- The Spectrum of Proof and Triangulating Data Sources

Internal? External?

○ Internal

- Performed by program staff
- Can be incorporated into programming
- Can use internal data
- Usually less expensive
- Staff may not be experts in evaluation
- Staff may not be objective
- Usually less comprehensive

Internal? External?

○ External

- May be more expensive
- Another group to coordinate with
- Finding evaluators is difficult
- Bring familiarity with best models to evaluate your program
- Have ability to organize and focus a proposal
- Focus just on data collection, analysis
- Provides objective feedback

Whatever you decide.....

- Include evaluators when planning the project and writing proposal
- Sources:
 - Your Staff
 - American Evaluation Association (AEA)
 - Western Michigan University
 - Recommendations

Putting It All Together

Your program theory connects:

Needs

Goals and Objectives

Organization and Communication

Work Plan (including timeline)

Data/Analysis Plan

Dissemination

Sustain/Grow the Work

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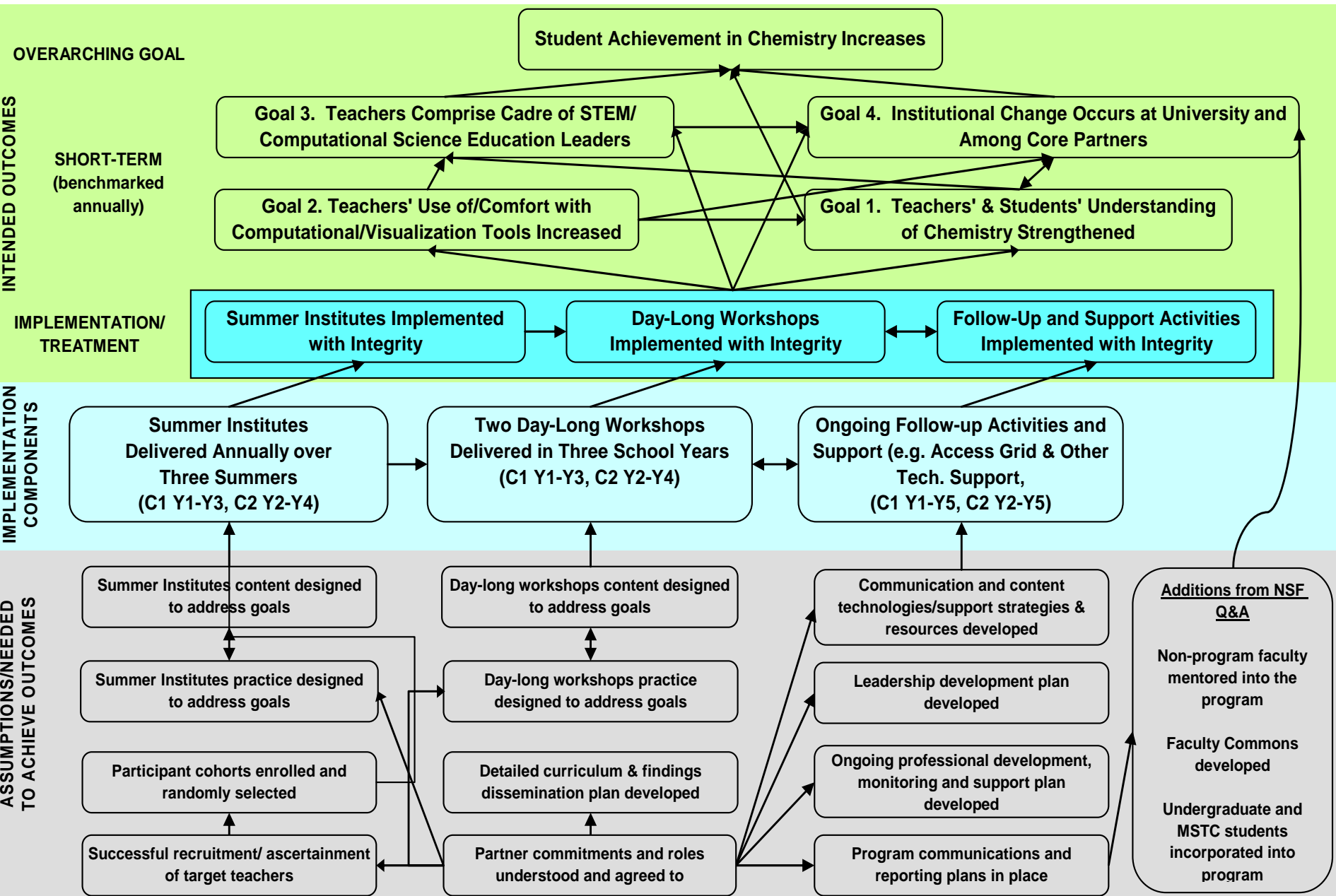
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What changes occur because of the project

Sample Program Theory Model



Pulling It All Together

- Recognize elements of successful project design and delivery.
- Understand the characteristics of effective project management.
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Remaining Questions
