Measuring, Evaluating, and Improving Nonprofit Effectiveness

Lenny Zakim Fund

Wednesday, May 3, 2017, 1-3 pm

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Workshop Goals

- Know which performance management practices you are currently using in your agency and which need to be built and strengthened
- Know how to strengthen your agency's mission statement
- Know how to assess a program logic model
- Know how to determine which core data you need in your database
- Know how to advocate for strengthening your agency's performance management system

What Is Nonprofit Bottom Line?

Who is the customer? What value is delivered?

- Customer 1: Participant wants quality services leading to outcomes. Mission aligned with participant success.
- Customer 2: Funder / donor wants return on investment, range from charity to impact.

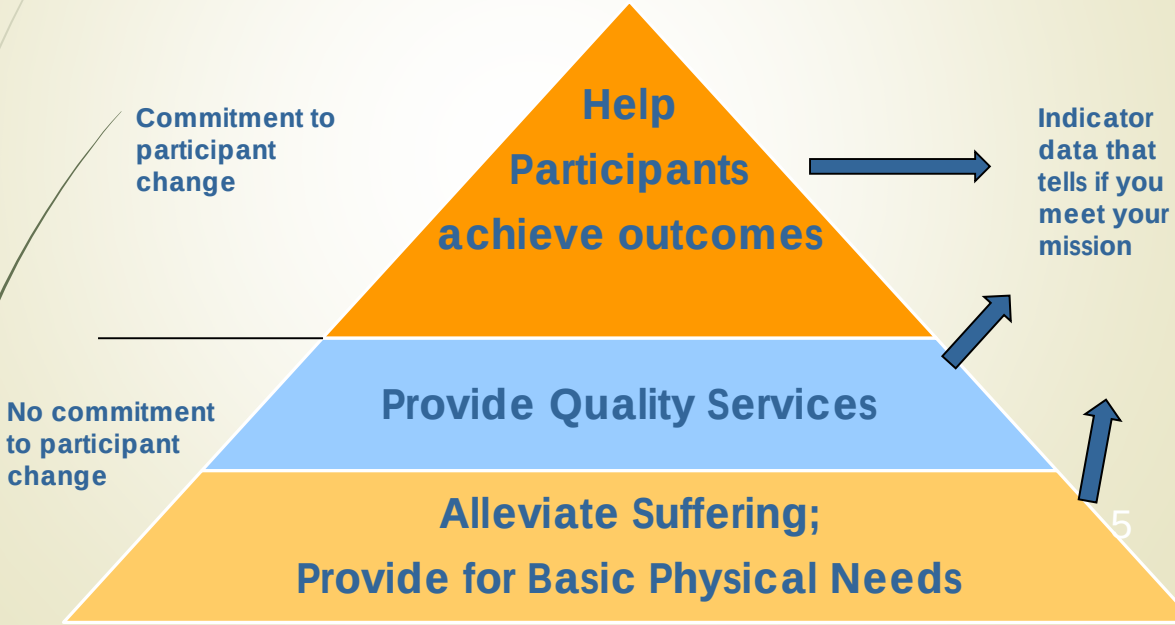
- What do these two customers both want in common?
- Where are these desires connected within your operations?
- What happens if mission is unclear?
- What happens if alignment is off?

What is an Effective Nonprofit?

- Amount of money raised
- Number of clients served
- Caliber of financial management practices
- Qualifications of staff
- Strength of partnerships
- Quality of programming

Nonprofit Bottom Line: Meet the Mission How Do We Know?

What is the Nonprofit's Mission Commitment?



Outcomes are Changes in People's Lives

Initial Outcomes

- New knowledge
- Increased skills
- Changed attitudes or values

Intermediate Outcomes

- Significant milestone
- Modified behavior

Long Term Outcomes

- Improved condition
- Altered status
- 1-2 years after program completion

Outcomes are Nonprofits' Bottom Line

What is Your Mission?

Who do you exist for?

(Specific individuals, organizations, or public)

- What are their strengths?
- Why do they need you?

To what end do you commit to engage them?

- Provide basic needs
- Provide quality service
- Help participants achieve outcomes

Nonprofit Performance Management System

- Definition: What agency does to ensure improved effectiveness, measured by participant outcomes
- Four big questions:
  - What participant outcomes do you commit to influence?
  - How well are you doing?
  - With whom must you partner?
  - How can you improve?

What Does an Effective Nonprofit Agency Look Like?

- Measure outcomes (and other key program metrics)
- Analyze outcomes: What do we learn?
- Use learning to guide next cycle of work
- Use outcomes data to drive decision-making about programs, staff, partnerships and resources
- **Improved participant outcomes**

What Does a Useful Mission Statement Look Like?

- Tells why agency is in business; definition of success
  - Clear
  - Concise
  - Compelling
  - Concrete
- Should describe target population and key long-term outcome
- Example: "Beat Rome"

Key Elements of a Program Logic Model

PARTICIPANTS Age, M/F, geography, strengths, challenges

INPUTS

Resources

- money
- staff
- volunteers
- Facilities, curricula, & supplies

Constraints

- laws
- regulations
- funders' requirements

ACTIVITIES

Services

- enrollment, eligibility, engagement
- dosage (days, hours, duration)
- program requirements
- program activities
- quality indicators

OUTPUTS

Products

- **# participants served**
- # enrolled
- # attending
- # completing

OUTCOMES

Changes in People

Initial outcomes:

- new knowledge
- increased skills
- changed attitudes or values

Intermediate outcomes:

- modified behavior
- significant milestone

Long-term outcomes:

- improved condition
- altered status

Logic Models: Key Questions

1. Focus on one participant
2. Meaningful, measurable, logical outcomes
   - Long-term: 1-2 years post completion
   - Intermediate: Behaviors, milestones, accountability
3. Dosage and duration needed for outcomes
4. Stakeholder voices included
5. Clear, detailed but concise language

Nonprofit Story: BalletRox

BalletROX

Benchmark Assessment Tool

- Purpose: help you build your outcomes management system from ground up
- 17 effectiveness practices
- Pre- and post-test
- Goal: level 4 practice
- Pair up with a colleague to take Assessment for your agency

What Operational Challenges Must Be Addressed?

<u>Nonprofit Initial Outcomes:</u>

Align program with effective practice

Clarify mission statement

Create or adjust:

- Agency theory of change
- Program logic models
- Outcome measurement plans
- Surveys

Build database

Align:

- Staffing and HR functions
- Development initiatives
- Strategic partnerships

<u>Intermediate Outcomes</u>:

Measure outcomes

Analyze and learn from data

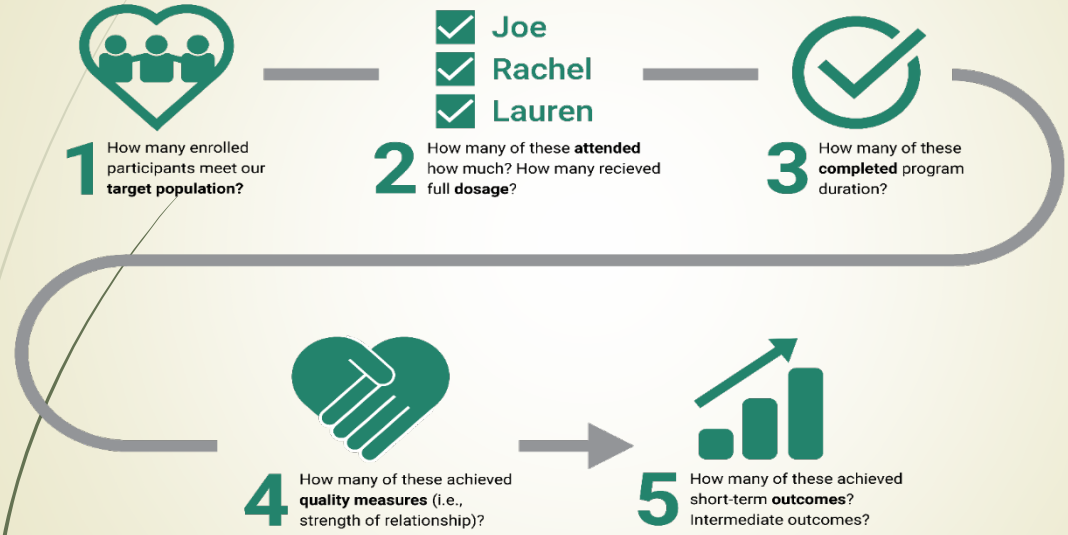
Use outcomes data to drive decision-making about programs, staff, partnerships and resources

<u>Long-term Outcome</u>:

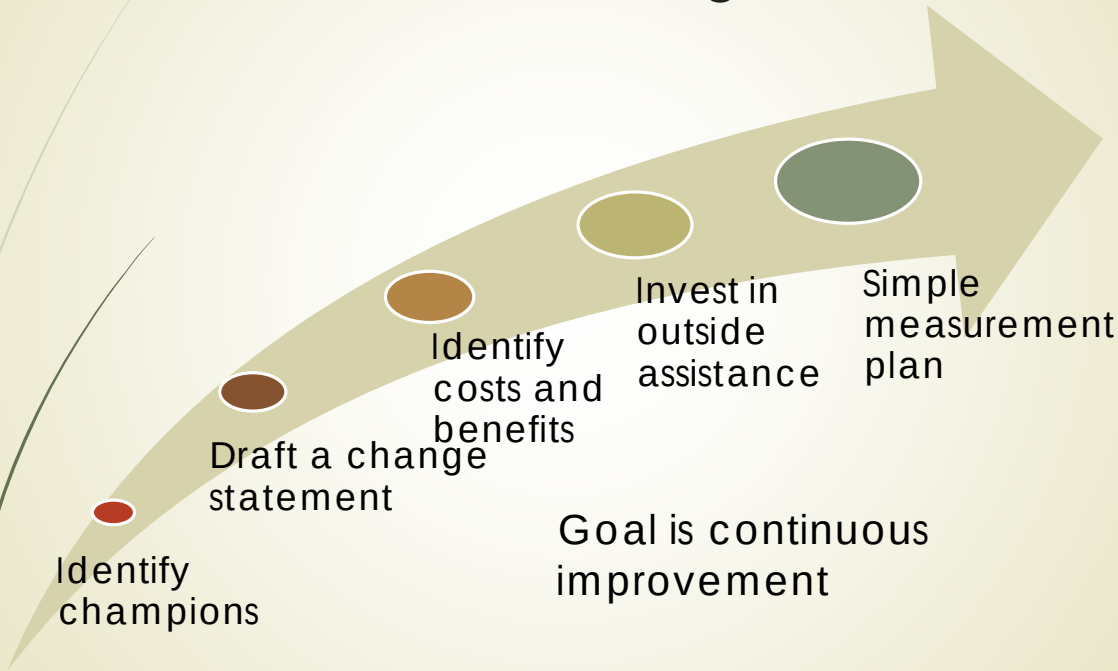
Improved participant outcomes

Program Data Value Chain

How do we know if we are meeting the mission?



Your Next Steps to Advocate for Outcomes Management



Useful Books and Websites

- Nonprofit Performance Management Network, www.nppmcnetwork.org
- Leap of Reason, Mario Morino, http://leapofreason.org/get-the-books/
- Working Hard and Working Well, David E. K. Hunter
- Performance Imperative, http://leapambassadors.org/products/performance-imperative/
- 6 Theory of Change Pitfalls to Avoid –Stanford Social Impact Review, www.ssir.org
- Outcomes Toolbox, Robert Penna, http://outcomestoolbox.com/
- Kellogg Foundation Logic Model development guide, https://www.wkkf.org

Are We Ready to Build Our Performance Management System?

My next steps to advocate (CONFIDENTIAL)

1. **Who are the champions for managing to results in our agency?**
   Consider board members, senior management, direct service staff, resource development staff.

2. **What should the agency look like if we manage to results?**
   What needs to change? Draft change statement here:

3. **Identify costs and benefits to designing and implementing performance management:**
   Costs: ***Benefits:***

4. **What needs to happen to win key people to this vision?** Identify incremental steps and people to be won over.

5. **Who can help us build and implement this system? Who may pay for it?**

6. **What is one simple, strategic, measurable piece of results data about your participants' success that can serve as an example for the system?**

Capacity Institute

Glossary of terms for nonprofit performance management

Performance management system: A system of organizational practices designed to improve an organization's effectiveness. For many nonprofits this can be defined as increasing participant outcomes.

(Nonprofit) Strategy: A clear statement about an organization's approach to creating social value in relation to its context. This statement will include the organization's mission statement, broad organizational goals, and measurable objectives.

Theory of Change: A clearly articulated approach to creating social value that links strategy to program operations. This theory willinclude target population, outcomes, codified program, indicators, measurement tools, and uses of data.

Outcomes: Measurable, meaningful changes in the lives of an organization's participants (clients/constituents) that are logically influenced by their experience in its program. Outcomes begin with internal, initial outcomes (understanding, skills, values, attitudes), which lead to intermediate outcomes (change in behavior, milestones), which, in turn, lead to long-term outcomes (new life condition).

Target population: Group of people (or entities) an organization is accountable to help achieve outcomes, according to its mission. The definition of this population includes clear demographics and circumstances describing the target population's need for support.

Service population: Broader group of people (or entities), clearly defined by demographics and circumstances, that an organization decides to serve for practical reasons, but is not accountable for outcomes.

Logic Model: One page conceptual map showing how a program helps participants achieve outcomes, with a description of participants, inputs, activities, outputs, and outcomes.

Participant: The population of individuals a program is designed to help achieve outcomes, defined by demographics and circumstances.

Outputs: The quantity of program service provided, usually defined as the number of participants enrolled, attending, and completing a program (number of slots).

Inputs: Resources dedicated to or consumed by a program to produce outcomes in the target and service populations. Inputs include staff, volunteers, program supplies, curricula, finances, administration, facilities, partnerships, staff training and support.

Codified program activities: The dosage and duration of program activities and relationships needed to engage participants and help them achieve outcomes, including enrollment, program requirements, and any necessary quality standards.

Outcome measurement plan: Work plan assigning specific staff specific duties to gather measurable data indicating whether participants have achieved success on priority outcomes. The work plan includes the timeframe, measurement tools, and prescribed process for gathering data.

Indicator: Measurable data that tells whether individual participants have achieved success on a priority outcome.

Measurement tool: Written or electronic source of measurable indicator data. Examples include surveys, interview protocol, pick-list scales, measurement logs, to be completed in accordance with outcome measurement plan.

What is a Nonprofit Performance Management System?

And why does my organization need one?

Outcome	Performance Management Benchmark - General	**Level 1:** Very few benchmark practices in place (does not meet benchmark)	**Level 2:** Some benchmark practices in place (does not meet benchmark)	**Level 3:** Basic Level of Capacity in Place (does not meet benchmark)	**Level 4:** Complete Capacity in Place (required to meet benchmark)	Capacity Rating as of fall 2015	Capacity Rating as of fall 2017
Agency mission and programs are built on effective practice framework:							
1	Agency's program strategy is based on effective or promising practices in its field.	Agency staff demonstrate limited understanding and value of effective practice framework and intended participant outcomes	Agency staff understand and value the effective practice framework, including the basic foundational practices (specify them)	Agency practices at least half of the foundational practices of the effective practice framework (specify them)	Agency practices ALL the foundational practices of the effective practice framework (specify them)		
2	Agency theory of change is built on a clear mission statement, identifies a specific target population, and sequence of outcomes it will help them achieve, through a codified program strategy on the ground.	Agency mission statement and program practice does not identify specific target population OR outcomes it will help them achieve	Agency mission statement identifies specific target population, outcomes it will help them achieve, *AND* has created clear program blueprint that codifies program strategy on the ground in realistic dosage and duration needed to achieve outcomes	Agency mission statement identifies specific target population, outcomes it will help them achieve, *AND* has taken some steps to implement codified program strategy on the ground (clear dosage and duration) with target population	Agency mission statement identifies specific target population, outcomes it will help them achieve, *AND* implements codified program strategy on the ground (clear dosage and duration) with target population that produces some evidence of positive intermediate participant outcomes. (see definition of range of evidence-based research in Introduction)		
3	Agency completes a logic model (LM) which clearly and concisely demonstrates its unique theory of change.	No program logic model (LM), OR no participant outcomes articulated	LM includes an accurate description of inputs, activities, outputs, and outcomes	LM includes description of inputs, activities, outputs, and outcomes that is clear and comprehensive; *AND* a reasonable connection exists between activities and outcomes	Logical, tight flow of influence from activities through entire sequence of outcomes, leading to meaningful long-term outcomes; LM elements are stated clearly, comprehensively, and concisely, including performance implementation standards.		

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Agency measures and learns from outcomes:							
4	Agency identifies specific indicators to measure participant outcomes, for the most important intermediate outcome and related initial outcomes.	Agency has not selected which outcomes to measure, or it is not convinced of the importance of the outcomes data it plans to collect	Agency has selected the most important outcomes to measure but does not have specific indicators identified	Agency has specific indicators for at least one important outcome which are observable and measurable; some uncertainty remains on which indicators to measure	Agency has identified and agreed on indicators for the most important initial and intermediate outcomes, which are specific, observable, and measurable		
5	Agency identifies data sources and data collection procedures for each indicator.	No data source selected, or uncertainty about data source selected	Data source selected, but is likely to produce inaccurate or inconsistent data, OR plan to collect data is incomplete or unrealistic	Data source(s) likely to produce accurate and consistent data; but written workplan to collect data is incomplete or unrealistic	Data source(s) likely to produce accurate and consistent data, considering both qualitative and quantitative data; written workplan to collect data is realistic and complete; *AND* staff are qualified and available to implement workplan		
6	Agency has technology systems in place to track indicator data for each outcome.	Agency has no technology system to track indicator data in outcomes measurement plan	Agency has a technology system to track indicator data in OMP, but it does not use it regularly or as intended	Agency has a technology system to track indicator data in OMP, data is regularly inputted, but reports are not regularly generated that are useful for analysis	Agency has a technology system to track indicator data in OMP, data is regularly inputted, and reports are regularly generated that are useful for analysis		
7	Agency collects participant outcomes data using systems and procedures described in 4 and 5 above.	Agency has not tried outcome measurement plan (OMP)	Agency has tried outcome measurement plan, but did not collect complete set of data for all relevant participants	Agency has tried outcome measurement plan and collected complete set of data for all relevant participants, but was dissatisfied with process and has not determined how to improve OMP	Agency implemented complete outcome measurement plan; and has identified ways to improve OMP or is satisfied with it.		

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8	Agency analyzes participant outcomes data; asks questions: What does it say? What does it mean? What do we learn?	Agency has not compiled or analyzed outcomes data	Agency has compiled outcomes data but has not met in a group to review, analyze and learn from it	Agency has compiled outcomes data and met at least once to review, analyze, and learn from it	Agency has regularly scheduled sessions including direct service staff, management, and Board, in which compiled outcomes data is reviewed to determine the meaning of results and lessons learned		
9	Agency has human resource performance appraisal system, documenting and connecting individual performance with organizational performance, and giving feedback.	Any of these is true: • Fewer than 50% staff and volunteers have current written job descriptions • Fewer than 50% receive regular supervision (once weekly for FT); • Performance reviews and professional development activities are rare. • Any increases are tied to cost of living allowances only.	75% staff and volunteers have: • Current written job descriptions *AND* • Regular supervision and support (once weekly for full time)	100% staff and volunteers have: • Current written job descriptions *AND* • Regular supervision and support (once weekly for full time) *AND* at least 50% staff receive relevant professional development and regular performance evaluations	100% staff and volunteers have all the following: • Current job descriptions with clear competencies needed to help participants achieve outcomes • Regular supervision and support (once weekly for full time) • Relevant professional development *AND* • Regular performance evaluations holding them accountable for helping participants achieve outcomes		
10	Agency uses outcomes data to improve service delivery, reward staff performance, and inform management decisions.	Agency does not measure outcomes (score 1-3 on #7) OR does not meet regularly to learn from outcomes data (score 1-3 on #8)	Agency measures outcomes regularly *AND* meets regularly to learn from them (scores 4 on both #7 and #8) *AND* has taken steps to change program or to drive a management decision	Agency uses outcomes data regularly to improve service delivery, to inform management decisions, *OR* to reward exemplary staff performance (at least one regularly)	Agency culture shows eagerness in regularly using outcomes data to improve service delivery, inform management decisions, *AND* reward exemplary staff performance		
11	Agency demonstrates improvement in participant outcomes over time.	Agency does not measure outcomes (score 1-3 on #7) OR does not meet regularly to learn from outcomes data (score 1-3 on #8)	Agency measures outcomes regularly *AND* meets regularly to learn from them (scores 4 on both #7 and #8) *AND* has taken steps to change program or to drive a management decision	Agency measures outcomes regularly *AND* meets regularly to learn from them (scores 4 on both #7 and #8), *AND* youth outcomes level increases from one year to next	Youth outcomes measured increases from one year to next (either number of participants achieving outcomes or average outcomes achievement level), and increase is likely attributable to improved service performance		

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Agency communicates clearly with funding partners:							
12	Agency develops written plans for each service delivery area: goals, objectives, target clients, projected outcomes.	Any is true: • Program descriptions do not consistently align with actual staff activities; *OR* • Written plans omit goals, objectives, target clients, OR projected outcomes; *OR* • Goals, objectives, target clients, or projected outcomes are unclear	All must be true: • Written plans accurately reflect staff activities • Goals are moderately clear, conceptual, and compelling	All must be true: • Written plans reflect activities • Goals are clear, conceptual, and compelling • Objectives are measurable • Projected outcomes are realistic and meaningful for target clients; *AND* • Written plans reflect solid theory of change scoring 1 or 2 in outcome 2 above	All must be true: • Written plans reflect activities • Goals are clear, conceptual, and compelling • Objectives are measurable • Projected outcomes are realistic and meaningful for target clients; *AND* • Written plans reflect solid theory of change scoring 3 or 4 in outcome 2 above		
13	Agency regularly informs stakeholders and funders of its participant outcomes.	Any is true: • Does not regularly send funding reports on time; • Does not report on participant outcomes; • Does not publish newsletter or updates	Both are true: • Funding reports are good quality and are usually on time, *AND* • Funding reports sometimes include outcomes data	High quality, on-time written funding reports consistently include progress on participant outcomes	High quality, on-time written funding reports include progress on participant outcomes; *AND* between reporting deadlines and required meetings, agency initiates personal contact with stakeholders and funders to review progress on participant outcomes		
Agency coordinates services with partners:							
14	Agency develops clear recruitment and enrollment process for its target population.	All participants are welcome. There is no eligibility criteria or enrollment process for our participants.	Agency has established eligibility criteria for participants, but referall and enrollment process Is incomplete.	Agency has established clear eligibility criteria for its target population, with one or more of the following in addition, but not all: sufficient referral sources, clear enrollment and assessment process, clear process for realistic participant engagement.	Agency has established clear eligibility criteria for its target population, *AND* sufficient referral sources, *AND* a clear enrollment and assessment process, *AND* a clear process for realistic participant engagement.		
15	Agency refers participants it does not serve to appropriate partners for relevant services (no wrong door).	All participants are welcome; *OR* ineligible participants are turned away without appropriate referral information.	Ineligible participants are occasionally given referral information to partner agencies.	Ineligible participants are always given appropriate, current referral information to trusted partner agencies.	Ineligible participants are always given appropriate, current referral information in writing to trusted partner agencies. In addition, staff make a follow up call or in person visit to see if referral "stuck."		

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16	Agency refers enrolled participants to appropriate partners to receive the support needed to achieve intermediate outcomes.	Agency does not refer participants to other services or opportunities. Does its best to provide all services themselves.	Occasionally staff refer participants out for other services or opportunities, depending on the staff person and their individual relationships and contacts.	Agency has developed a written agreement with a partner agency that is accountable for helping participants achieve success on a related outcome (shared goal). May not yet be mutually sustainable or have outcomes data.	Agency has developed agreement with partner agency that: 1. Is accountable for helping participants achieve success on a related outcome that is necessary to achieve intermediate outcomes, 2. The terms of agreement and referral process are documented in writing, 3. Has a track record of success, including outcomes measured with target population (relevant quality services), *AND* 4. Is mutually sustainable for both agencies in terms of relationship and benefits.		
17	Agency develops strategic partnership with agency accountable for long-term meaningful participant outcomes (baton hand-off)	Agency is unclear on long-term participant outcomes or does not have partners identified who are responsible to help participants achieve long-term success.	Agency has articulated its expected long-term participant outcome *AND* has identified at least one potential partner who is responsible to help participants achieve long-term success (but no written agreement has been articulated)	Agency has developed a written agreement with a partner agency that is accountable for helping participants achieve success on long-term outcomes (shared goal). May not yet be mutually sustainable or have outcomes data.	Agency has developed agreement with partner agency that: 1. Is accountable for helping participants achieve long-term success as a shared goal, 2. The terms of agreement and referral process are documented in writing, 3. Has a track record of success, including outcomes measured with target population (relevant quality services), *AND* 4. Is mutually sustainable for both agencies in terms of relationship and benefits.		

What Is a Nonprofit Performance Management System?

…And Why Does my Organization Need One?

How can our nonprofit report efficiently on all the data our funders want?
Our Board is demanding data on program effectiveness, so we can raise more funds! Where do we begin?
Whose job is it to gather, compile, and analyze the data? How do we make these decisions?

These common nonprofit pain points are symptoms of a deeper need to strengthen our performance management capacity. This refers to a set of practices that help nonprofits improve on their mission effectiveness. Before we can determine a reasonable data set to share with our Board or our funders, we first must come to agreement on a clear definition of organizational success.

We can understand a nonprofit's mission by its clear response to these two questions:

1. ***Who do we exist for? Whom do we directly influence?*** This is its target population, which may be individuals, organizations, or a whole community. A strong nonprofit focuses on a specific target population and knows its demographic characteristics, the strengths and assets participants bring, and the specific challenges they face to reach their goals. This is the reason why they need the nonprofit's help.

2. ***To what end do we engage them?*** To what result do we commit to them in our mission? For what are we accountable to the target population? Consider three different kinds of nonprofit mission accountabilities:
   a. Some nonprofits provide for basic needs, for example a food pantry or the Red Cross.
   b. Some nonprofits are accountable to deliver a specific quality service, for example universities, some health care organizations, some museums and arts organizations.
   c. Some nonprofits help people (or organizations) achieve outcomes. Outcomes are changes in people's lives, starting with initial outcomes (new knowledge, increased skills, changed attitudes or values), leading to intermediate outcomes (reach program milestones, changes in behavior), leading to long-term outcomes (change in condition or status), not more than one or two years after program completion.

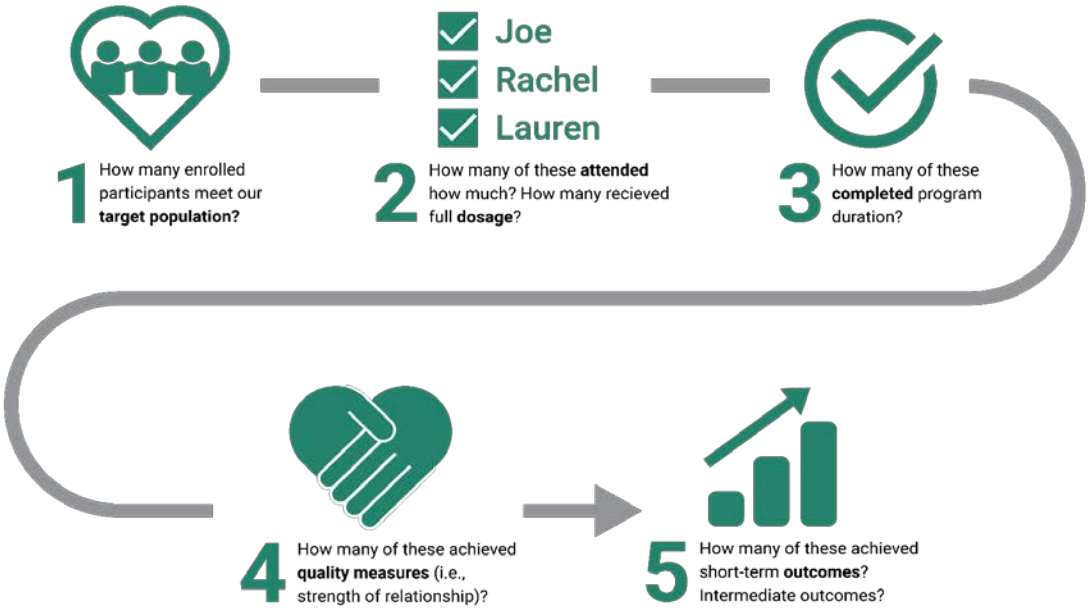
   All three kinds of missions are uniquely valuable to deliver public benefit. All three kinds of missions can be measured, and the nonprofit's operation managed to improve performance on that metric. The point is for nonprofits to be clear and focused on their "who" and "to what end."

For outcomes-driven nonprofits, organizational performance is ultimately defined as success in achieving intermediate and long-term participant outcomes.

A nonprofit performance management system enables an agency to answer these questions:

- What results or outcomes are we helping our participants accomplish?
- How well are we doing?
- With whom must we partner?
- How can we improve?

The goal of data analysis is to answer the question, *How many of our target population (#1 below) reach long-term outcomes (#5 below)?* And for the ones who did not reach the desired destination, *Where did we lose them? How can we do better next time?* Here are the essential data categories human services nonprofits can consider when designing their performance management systems:



Once a nonprofit collects these key data sets, the next step is to analyze the data to learn how to strengthen the program to increase results. The organization can use this data to drive decision making -- about program improvement, about human resource management, about raising and allocating resources, and about strategic partnerships. This is an all-hands-on-deck, relentless pursuit of improving participant outcomes, which requires that a nonprofit make changes in the way it manages its operations. For many nonprofits, this shift represents significant culture change, requiring a 3 to 10 year transition. For this reason, we recommend engaging outside assistance to help your agency navigate building and implementing your performance management system.

How can a nonprofit prepare to strengthen these capacities? Scores of Boston nonprofits have built their performance management systems by following this road map of organizational commitments:

- Align with effective practice in the field
- Clarify mission and theory of change, including target population and outcome sequence
- Map logical program influence on outcomes, including necessary dosage and duration of activities
- Agree on specific outcome indicators for the target population
- Agree on accurate data sources and collection practices
- Build out database to hold, compile, and report on key data
- Align program performance with human resource management
- Align program performance with resource development functions
- Align program performance with strategic partnerships

These practices help nonprofits prepare to gather and analyze data to drive decision making for mission improvement.

The payoff for this investment is increased participant outcomes and mission effectiveness. The process leverages every *other* dollar and every *other* hour invested into your organization. Leap of Reason, by Mario Morino, provides a compelling case for the value of nonprofit performance management systems.

The Capacity Institute helps Boston area nonprofits build 17 performance management practices over two years. For more information, visit http://www.bmaboston.org/capacity-institute and contact Ellen Bass. Ellen is a member of the Leap Ambassadors, a national community of nonprofit thought leaders and practitioners who promote high performance in the nonprofit sector. The Capacity Institute's practices are aligned with the Performance Imperative, the Leap Ambassadors' seven practices of highly effective organizations.

Mission Statement Assessment

1. Write your agency's mission statement below from memory. (Now, cheat if you have to!)

Work with a partner at your table. Assess your agency's mission statement above. In your opinion:

2. Does it describe what your agency is in business to accomplish? Does it define what success is?
   4=YES! 3=yes 2=no 1=NO!

3. How concise is it?
   4=YES! 3=yes 2=no 1=NO!

4. How compelling is it?
   4=YES! 3=yes 2=no 1=NO!

5. How concrete is it?
   a. Does it describe your specific target population?
   4=YES! 3=yes 2=no 1=NO!

   b. Does it describe the outcome they will achieve?
   4=YES! 3=yes 2=no 1=NO!

6. How clear is it?
   4=YES! 3=yes 2=no 1=NO!

Total score (add all responses above, top score is 24): _____

7. What ideas do you have about how to improve it? Write your draft mission statement here, which:
   - Describes why your agency is in business, what success is
   - Describes who is your target population and the outcome you'll help them achieve
   - Is clear, compelling, concrete, and concise

Performance Management Seminar with Ellen Bass

May 3, 2017

Much of the presentation was a review of the PowerPoint, but below are select notes that clarify or add to the presentation.

- Advantages of smaller non-profits is that they can turn around quickly, adapt and are closer to their communities
- Most small non-profits will use excel spreadsheets for their databases, sales force is an option too
- Measurement should be streamlined, your job is to provide a service not data for researchers
- Measure the small things
- Basic needs need to be met first
- You don't need to be good at EVERYTHING, excel in the areas specific to your mission

Mission Statements

- A non-profits bottom line is its mission not the money
- It is important for a non-profits board and staff members to agree on the mission statement
- You need to make it clear to funders what the mission of the non-profit is

Logic Models!

- Your outcome sequence must be tightly and logically connected
- Measure milestones of behavioral change
- Figure out the pathway that gets you to your outcome
- Measure outcomes for your target population, that's who you committed to, you may serve others but that is not your focus
- Completion number is your output, skills learned is your outcome
- Even though people may not ask for a logic model they like when it's included