Managing for Outcomes

Using Outcomes Measurement on a Day-to-Day Basis

To get the most use out of an outcome measurement framework, it's a good idea to use it as the basis for each stage of program management from building support to staff planning to monitoring.

Building Support

There are many nonprofit organizations with great ideas. With the changing economic environments, it is important to build a diverse funding base for all programs. The first step is to identify government agencies and community groups that will support the program with funding or in-kind contributions.

Funders take notice when a need is clearly identified and a clear and logical way to address that need is described in a brief and clear way. The outcome measurement framework shows a coherent and succinct program logic. The monitoring and evaluation plan shows that not only do you know what you are doing, but you are prepared to be accountable for the resources by measuring outcomes.

Present the outcome measurement framework to your board, community partners, funders, and potential funders and seek a commitment to support it in some way. Make a list of the support that you have gathered and begin to plan the program in more detail.

Gathering The Resources

Although it is useful to market the idea with an outcomes measurement framework, you will need a little more information/documentation to actually secure the funding. The good news is that the framework provides an outline of what you will need to include in the proposal.

Tool 8 provides a checklist of common proposal requirements. The level of detail required in any proposal depends on the funder. Some funders want short, succinct proposals (5 - 8 pages). This is more likely to be the case if you are seeking under $20,000. Others require in-depth description and justification (10-30 pages including appendices). Generally speaking, the more money you ask for, the more rigorous is detail required.

It is important to assess how much time a proposal will take to develop against the amount of money being sought. If a funder wants a lot of detail for $1000, it may take more time than it is worth. Having determined that a fund is worth applying for, it is important to clearly follow the application instructions.

Setting Up the Project

Your project has been accepted and you are scrambling to get it going. Your outcome measurement frame work can be used to ensure inputs are in place, appropriate staff are hired, the workplan is developed, and the program is monitored.

Ensure Inputs are in Place

You will want to make sure that the inputs required to run the program are in place and available to you when you need them. Begin by preparing a detailed action plan to confirm the inputs and resources to support them. Tool 9 provides a planning tool to assist you in managing inputs.

This tool will help you think through the activities that you need to complete to ensure the inputs are in place as well as alternatives that you could pursue for those situations where a plan falls through.

Staff planning

If you want to increase your chances of achieving the outcomes, there should be a clear relationship between the outcome measurement framework and the qualifications of the staff involved in the project. Identify the positions required to undertake the activities and develop appropriate job descriptions. If you are assigning existing staff to the positions, review the job description and their qualifications to ensure that they have the capacity to support the program to achieve the results that you are seeking. Sometimes the skills required cannot be found in the same person. In that case consider two part-time roles.

TIP

Not all funders are using outcome language yet. In these cases, they will ask for program goals and objectives. You will need to convert the language. Your intermediate outcomes correspond to goals and short-term to outcomes. The long-term outcome is the overall vision. Most funding proposals ask for activities to be listed which can be drawn directly from the Outcome Measurement Framework, fleshed out with more detail.

Work Plan Development

The outcome measurement framework provides a general description of activities that will create the change you want in the community - a good starting point for a program work plan. This plan should include details of each task that needs to be undertaken, as well as the person responsible and the timeframe. It should be developed with the staff members who will undertake the work. It should also provide a reporting mechanism so that task completion can be tracked and alternative plans made where required. Tool 10 is a guide to the development of a workplan.

Program Monitoring

Continuous monitoring requires an appreciation of the value of monitoring and a commitment from the staff and program participants to carry out monitoring activities. You have detailed monitoring plan that was developed with your staff. It is important to dedicate resources and management support.

This involves determining how the information gathered will be stored and managed. Community organizations are increasing their capacity to manage program information databases. Many manage their data using Excel spreadsheets and ACCESS databases.

Some government programs have a common database that they expect their programs to enter data into. Many large organizations are moving toward using the Canadian Outcomes Research Institute's Hull Outcomes Monitoring and Evaluation System (HOMES) system. Information on the HOMES system is available at www.hmrp.net/CanadianOutcomesInstitute.

It is sometimes difficult to clearly match the data with the program outcomes identified in the outcome measurement framework. It is important not to leap onto a database train until you know that it will take you where you want to go for the resources you have available.

Ongoing Program Review

You now have the program and the monitoring running simultaneously. How are you going to reap the benefits of this excellent planning? How will you ensure that the information collected is used? One suggestion is a regular feedback process where the program staff and management review the monitoring findings against the planned outcomes. This could simply be a periodic staff meeting dedicated to this purpose.

This is a particularly valuable exercise when short-term outcomes are being measured. If the anticipated short-term outcomes are not being achieved, adaptations to the action plan should be considered because the likelihood of achieving the intermediate outcomes is low. Similarly, if short-term outcomes are achieved at higher levels than expected, creative reflection could identify new opportunities that could be pursued to capitalize on your success.

Tool 8

Preparing a Proposal

Purpose

To help your group present your project for fundraising purposes.

Description

This tool uses a series of questions to help you understand the kinds of information you will need to include in a project proposal. Suggestions for content are provided. It also refers you to relevant tools in this Guide that may help you to fill in any missing information.

When to Use

When preparing a proposal application.

How to Use

Prior to using this tool, your group will want to investigate the proposal requirements of your prospective funders. Each funder usually has its own requirements. Use any questions that arise during your review of their proposal guidelines to initiate a conversation with a funding officer. You will want to start developing good communications with your funder as soon as possible.

In Step 1, review the types of information funders often want included in a proposal.

In Step 2, go through the questions listed, and identify the information you will need for your proposal. If your group doesn't yet have the required information, refer to the tool suggested to help you develop it. Think about how you will present your proposal in the funder's format. If there is no required format, use the questions provided to develop an outline for your proposal.

Step 1: Reviewing What Is Required in a Project Proposal

Funding organizations may want to know about your:

- organization as a whole — its vision and mission, its governance and management, its overall budget
- project idea — what is needed, what you will do, what will change once the project is complete
- project rationale — where the project idea comes from, why it is a good idea, and why your organization is in a good position to undertake it
- inputs, activities, outputs, and outcomes
- schedule and process for doing the work
- project budget, and
- plan for tracking project progress and reporting on it.

Step 2: Preparing Proposal Content

Go through the questions below and identify the information you will need for your proposal.

Questions	Your OMF	Content to Include
Who you are & What you do?	Organization	• Your organization's mandate, mission, vision. • The Team – competencies, Board members, Organizational chart • Your ability to manage the project successfully -accountability • How the funding of this project would build on past successes and enable you to do more.
What is the Context of the Project?	Assessment of Environment Purpose Project Time Frame People Groups/Community Sectors Involved Assumptions and Risks	• Describe the community, the issues and the needs the project is going to address. • Identify the people and communities targeted. • Describe partners and resource people. • Explain the reach of your project?
Where do You Want to Go?	Impact Statement	• What is the long-term outcome of your project? • What will the community look like 3-5 years after the project?
Activities & Anticipated Results	Activities Outputs Outcomes	• Describe all your activities and expected outcomes. • Include a time frame for activities • Describe outputs and outcomes and link them to the activities
Evaluation & Monitoring	Data Collection Plan Analysis and reporting	• Describe your evaluation plan – indicators, data collection, analysis and reporting. • Explain how you will share what you learn from the project.
Budget	Inputs	• What are the resources necessary for the project? • Identify in-kind contributions: volunteer hours, facility, equipment. • Identify contributions of other funders.
How is your project linked to the funder's objectives and mandate?	Project Purpose Situational Analysis	• Make a case for how this project helps the funder meet their objectives. • Provide reasons for why should they fund this project and not a different project.

Tool 9

Ensuring Inputs are in Place

Purpose

To help your group plan for appropriate resources.

Description

This tool provides an opportunity to develop an action plan for ensuring all resources are appropriately in place when you begin your project.

When to Use

- At the beginning of any new project, once you have been approved for funding.
- After your group has gone through one round of data gathering and analysis and you want to adapt your program.

How to Use

In Step 1, identify funds and inputs required.

In Step 2, work as a team to identify actions required, people to do the work, and timeline on the action plan provided below. Because community-based projects are often unpredictable, it is also useful to identify an alternative plan if you are unable to access resources in the way originally planned.

Input Action Plan

Funds	Action Required	By Who	By When	Alternative
Funding from SMART	Sign contract Agree on payment schedule	ED/SMART rep		
Funding from partner	Advise of SMART Funding Determine date of decisions Prepare interim budget until finding approved	Program Coordination		

Inputs	Action Required	By Who	By When	Alternative
Program Space	Develop a space agreement with partner Schedule program use Identify equipment and access requirements			
Staffing	Identify positions and how they will be filled Write job descriptions Post job advertisements Coordinate interviews and decision-making			
Office space and equipment	Determine if new office space is required or whether shared space will fit the bill Communicate with staff regarding sharing of space Determine equipment requirements Arrange for necessary equipment			
Program supplies	Determine protocols for securing supplies on an ongoing basis Order specialized supplies where required			

Tool 10

Creating a Work Plan

Purpose

To help your group develop a workplan using your Outcome Measurement Framework.

Description

This tool provides an action plan template to detail what needs to be done to complete the activities described in the Outcome Measurement Framework

When to Use

- When you are preparing your project proposal because many funders want a detailed action plan
- Once funding is in place, to facilitate a team approach
- After your group has gone through one round of data gathering and analysis and you want to revise your activities.

How to Use

In Step 1, transcribe actions outlined in your Outcome Measurement Framework onto the project workplan template below.

In Step 2, identify in a more detailed way, all the specific activities that need to undertaken to complete that action. Assign the task to an individual and set a mutually agreed upon timeframe for completion. Explore the supports needed so that the individual can complete this task. When each task is done, check it off and go onto the next!

Project Work Plan

Activities (from OMF)	Action Required	By Who	By When	Additional Supports Needed (Resources or management support)
Example: Recruit and train volunteers	Recruit and train volunteers Contact Volunteer Vancouver Post volunteer information session advertisement Develop volunteer application forms Coordinate applications Interview candidates Conduct criminal record check	Sandy	Monday	Contact number from administrator