How to use logic models for successful project planning – *tools, techniques and cases*

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National Arts Strategies National Justrategies

Agenda

- Introductions
- What are logic models
- Why are they useful
- Elements of a logic model
- Examples
- Exercise
- Wrap up



What is a Logic Model?

A series of **If/Then** statements visually depicting **the flow** of what you have in terms of resources, how you plan to use those resources and what results or outcomes you expect to happen as a result.





Logic Models

Left to Right or... Right to Left

Assumptions	Inputs	Activities	Outputs	Outcomes	Impacts
The underlying assumptions that influence the project's design, implementation or objectives	Human, financial, organizational & community resources needed to achieve the project's objectives	Things the project does with the resources to meet its objectives	Products of implementing the activities, which are necessary but not sufficient indications of achieving the project's objectives	Short-term intended and unintended changes (e.g., in knowledge, attitudes, skills) as a result of the project	Long-term intended and unintended changes (e.g., in behavior, status, systems) as a result of the project



Example: NAS Chief Executive Programme

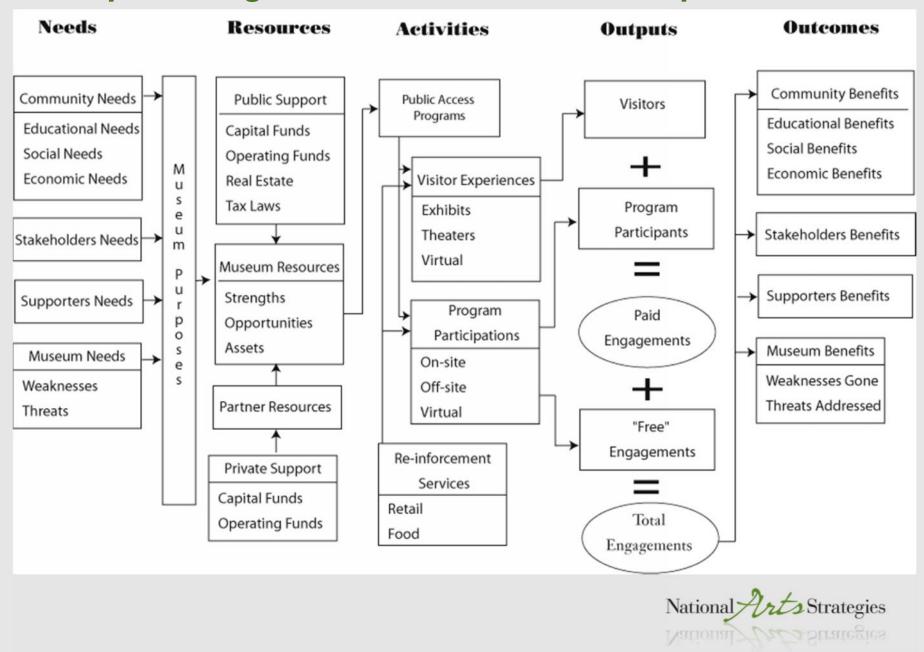
Assumptions	Inputs	Activities	Outputs	Outcomes	Impacts
 Leaders need greater skills to deliver local civic value Little or no national effort to organize/ train leaders from different types of organizations/ disciplines Few voices are heard / views represented in the arts and culture field Organizational structures may be isolating arts from the local community 	 50 leaders from around the world, from many different arts and culture disciplines NAS team 2 university partners motivated and challenged by this programme A wonderful retreat-like setting for the final convening Funding 	 Application process and interviews Learning cycles Learning plans completed by all participants Mid- programme evaluation by each leader 	 Leaders will blog and/or be digitally video interviewed about related topics (80%) All 50 Leaders will attend 3 in- person events Leaders will participate in each learning cycle (95%) Leaders will share programme frameworks with their staff and board (95%) 	 Leaders will: have more diversified professional networks by geography, viewpoint and discipline have a greater awareness of their own strengths and weaknesses will involve others in change and share transformative leadership concepts 	 Leaders have a broader strategic and operational view – beyond a particular discipline Organizations are more connected to their local communities The direction of the arts and culture field will be determined by a larger number of leaders/voices



Example: Inputs to impact Sidney Theatre Company

	INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES	IMPACT	
ARTISTIC	ART WORKS Texts, designs, scores, movement, ideas INFRASTRUCTURE Venues, tools, systems, plant and equipment	THEATRE Marquee, main stage, provocateur, incubator, youth	PRODUCTION # programs presented Attendances Program/audience diversity	SATISFACTION Positive experiences provided to audiences and participants	STIMULATION Theatre provides aesthetic stimulation, pleasure, entertainment, surprise, socialisation, joy, discovery. These contribute to personal well being. INSPIRATION	
		ARTISTIC R&D Commissions, workshops, residencies	NEW WORKS Artists engaged Works developed Works produced	A FUTURE FOR THEATRE Career paths supported Prof development Receptive public		
EDUCATION	CONNECTIONS University partner/s School partners Curriculum and texts S Drama Methodology	EDUCATION PROGRAMS Teacher professional development Curriculum linkages	PARTICIPATION # participants Attendances Resource usage	CREATIVE FUTURES Enhanced school learning outcomes Enhances teacher quality and confidence	Experiencing excellent art can inspire people to achieve excellence in their own fields. It can lead to people explore their own creativity.	
SOCIAL	CONNECTIONS Community partners Research to guide priorities Specialised knowledge	COMMUNITY PROGRAMS Greening Theatre in Communities Equity and diversity Liveable communities	PARTICIPATION # participants # programs delivered Attendances Energy/water/waste stats	SOCIAL SUSTAINABILITY Greening impact Community impact Equity and diversity Liveable communities	Arts rich educations promote innovation and productivity. COHESION Experience of the arts can	
PEOPLE	PEOPLE Talent, skills, creativity, experience, commitment	HR Communication, training, recruiting and induction, appraisal	PEOPLE Roles and jobs provided Training delivered Equity, diversity stats	A GREAT PLACE TO WORK Committed staff STC keeps up with change	enhance personal empathy and insight. Engagement around arts activity can promote dialogue and understanding between different individuals and groups.	
BUSINESS	INVESTMENT Earned revenue Contributed revenue Partnerships	BUSINESS OPERATIONS Finance, operations, marketing, front of house, business and donor development	RESOURCES Revenue diversity Profit	FINANCIALLY SECURE Balance sheet strengthens providing stability	groups.	

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Example: Using Arrows to show relationships

Example: Variation using Assumptions & External Factors

	Inputs	Output Activities P	s articipation		t comes – Imp Medium-term	
	What we will invest	What we plan to do wa	Who we ant to reach	The re	sults we hope	to see
Situation Priorities	-The MIA (the place/space) -Global, diverse collections -Staff -Intellectual capital -Content -Content -Context -Expertise -Leadership -Energy -Customer service -Commitment -Time -Money/funds -Docents & Volunteers -Board/Trustees -Funders/Donors -Technology -Brand -Exhibitions -Onsite experiences -Online/web experiences -Mobile, social networks, gaming -Print and broadcast media -Off-site learning -Distance learning	 Museum Lab Omni-Channel Approach Financial Sustainability Collaborate, inside & out Innovation as norm (I.e., experiment, risk, fail fast) Seamless integration of experiences across channels Balance traditional & digital Innovative & responsive programming Participatory activities Public contributions Diversity and inclusion (valued and reflected) Something for all ages Interactive online communities Online learning modules Fee-for-service programs School, community, & global partnerships Increased endowment, contributed & earned income New HR and org development Building feasibility & master plan 	-Families	 -Capture interest -Participant comfort -Attract tech-savvy participants -Attract online participants -Attract younger participants (I.e., teen) -Attract broad and changing audiences (I.e., ethnic commun.) -Serve as 'hub' (conduit for community connectivity & collaboration) -Connect people with art & ideas -Meet participant expectations -Achieve participant satisfaction 	-Make data-driven decisions (focus and allocate resources) -Anticipate trends -Participants play & learn -Inspire wonder -Foster deeper, more meaningful experiences -Keep audiences engaged on-site & off (I.e., retention) -Build and sustain local following -MIA perceived as current and responsive -Support 21 st century learning skills -Remain vibrant and relevant (thrive, not survive)	 Audience Engagement Globalization Museum, Inc. -Long-term engagement (supporting lifelong learning) -Cross- community and regional impact -Build and sustain an international/ global following -Increase public's critical thinking, global awareness, & media literacy -Reinvent the field
	Assumptions Status quo; balanced budget Engaged staff; staff buy-in Increasingly participatory culture Traditional museum model not sustainable			External Factors Limited leisure time Uncertain economic climate		



Exercise – Building a Logic Model (30min)

- Choose case example to apply
- Form groups of 4-5 people
- Sketch out a logic model together (15 minutes), then
- Turn to the group closest to yours and compare models – ask questions (15 minutes)



Logic Model Activity – Case A

- Organisation:
- *Initiative*: Develop new events and marketing strategies to engage 18-24 year olds
- *Goal*: Increase participation of 18-24 year olds by 15% by September 2013
- *Budget*: HK\$562,500



Logic Model Activity – Case B

- *Event*: Annual Fundraising Gala
- Goals : Raise HK\$1.17M (US \$150K) and make the donors feel good about continuing to support the organisation
- *Location*: Grand Hyatt Hotel
- Invitees: Mid-level to Major donors
- *Budget*: HK\$450,000 plus in-kind support



Debrief

- Helpful? In what way?
- Did anything surprise you?
- Did you get "stuck?" If so, where?
- Are there elements of a logic model you cocreated that you want to share?



A logic model...

- Helps focus a project by making assumptions and expectations explicit
- Articulates a theory of action
- Is a systematic and visual way to represent an underlying theory of change
- Increases stakeholders' understanding about a project
- Can help us create more successful projects



Further Resources

- Evaluation Toolkit http://toolkit.pellinstitute.org/evaluation-guide/planbudget/using-a-logic-model/
- Logic Model Development Guide -<u>http://www.wkkf.org/knowledge-</u> <u>center/resources/2006/02/wk-kellogg-foundation-logic-</u> <u>model-development-guide.aspx</u>
- University of Wisconsin online course <u>http://www.uwex.edu/ces/lmcourse/</u>
- Innovation Networks' tools - <u>http://www.innonet.org/index.php?section_id=4&content_id</u> <u>=16</u>
- Blog post on Logic Models - http://createquity.com/2012/06/in-defense-of-logic-models.html





Thank you!

