Outcome Based Objective Writing

A Presentation by
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Presenters

- Dr. Lifvendahl is an Adult Educator and Consultant.

- Practice in:
  - Outcome Based Management
  - Organizational Development
  - Assessment and Evaluation
  - Customized Curriculum Design
  - Training and Development

- Teach at: Cardinal Stritch University and National-Louis University.

- Work with clients in various fields.

Overview

- **Responding to a Request for Proposal (RFP) is essentially an "act of translation".**
  - Funders seek Agencies that directly support their agenda.
  - Program and development staff may use different "professional languages" within their disciplines.
    - Business terminology dominates funder preconceptions.
- **Bridging these communication differences is a result of well written <u>Outcomes</u>.**

Standard Format for Grant Writing

☐ The basic elements of a written grant are:
  - ■ Problem Definition
  - ■ Project Design
  - ■ Measurable Outcomes and Objectives.
  - ■ Established Evaluation Protocols
  - ■ Implementation Time Line
  - ■ Conclusion
  - ■ Budget

Program Mission/Vision Statements
Drive Outcome Creation.

Outcome Defined

- An **Outcome** is defined as the change(s) in (or benefits achieved by) clients due to their participation in program activities.

- This may include but is not limited to changes in participant's <u>knowledge, skills, values, behavior, or condition of status</u>.

  (Ref: Donors Forum of Wisconsin)
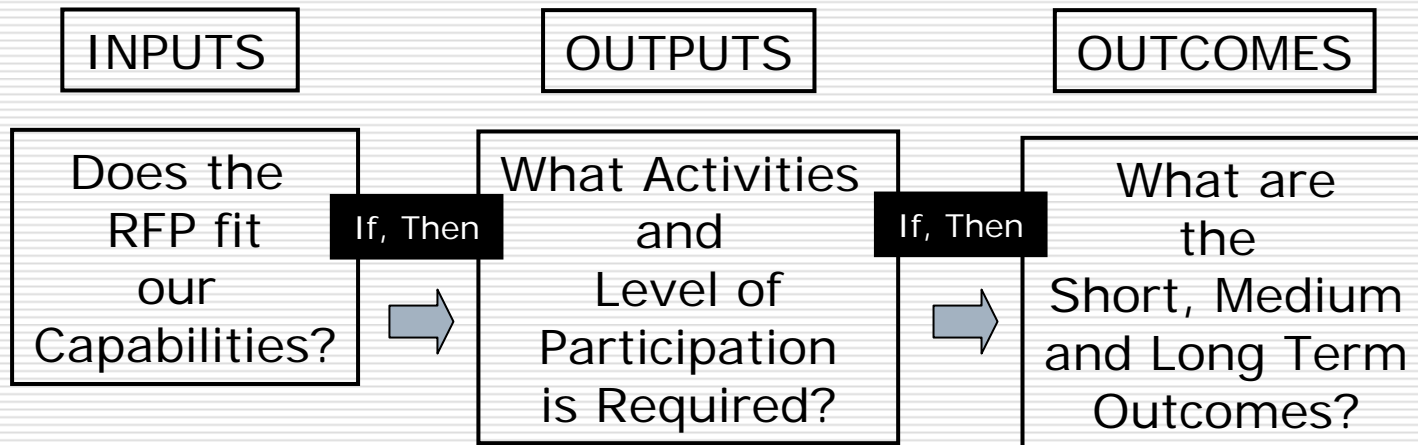
Objectives

- Each objective should:
    - Define a clear description of expected levels of performance.
    - Define a concise sense of educational direction.
    - Target a single Program activity.
    - Utilize little professional jargon.
    - Employ action verbs. Examples include: *define, describe, demonstrate, utilize, integrate, predict, prepare, attend, decrease, increase, report, etc.*

Goals

- ☐ Well written Goals possess the following components:
  - ■ Consensus based and attainable given current resources.
  - ■ They should also have, as appropriate:
    - ➢ A measurable number or percent.
    - ➢ A date for completion.
    - ➢ Assigned responsibilities.

Process

Define the **Terminal Outcome**, then work backwards.

Planning Process

INPUTS		OUTPUTS		OUTCOMES
Does the RFP fit our Capabilities?	If, Then	What Activities and Level of Participation is Required?	If, Then	What are the Short, Medium and Long Term Outcomes?

Exercise

- The focus of this presentation is on *Outcome writing*.

- Initial Exercise:
  - Real World RFP (Agency Anonymous)
  - What follows are generalized Outcome Translation Steps.

RFP

"The organization(s) must use this grant to develop or improve an idea, approach and/or collective model that will result in specific strategies and outcome measurements that will directly contribute to (I.e. feed into a pipeline of projects working to achieve) the Initiative's financial literacy and wealth creation objective:

RFP cont'd

*To help low-income, women-headed families in the XXX Metropolitan area to **obtain a base level of financial knowledge** (e.g. training in:*

- *money management, saving/investment, credit, and income; shifting behavior patterns)*
- ***and increase their collective wealth** (e. g. through debt reduction, receiving the ETTC, IDAs, savings accounts, increased income, home ownership)*
- ***by $40 million in the next three years."***

RFP cont'd

"Priority will be given to agencies that:

- *Collaborate with other community organizations;*
- *Utilize proven approaches;*
- *Create long and short term solutions;*
- *Incorporate a variety of strategies;*
- *Engage with partners; evaluate using qualitative and quantitative measures; and*
- *Target poverty level women-headed families."*

Translation: **Funder Objective(s)**

- ☐ Increased knowledge of target audience in financial management.
- ☐ Increased collective wealth of target audience to equal $40M in the next three years.
- ☐ Demonstration of the Project Agency's ability to collaborate with other agencies.

Restate Objective(s) as a **Terminal Outcome**

As a result of participation in this program, participants are

<u>*competent*</u>

at managing

their financial affairs.

Key Questions **(Participant)**

- What is "competence"?
- What is the expected level of competence to be achieved?
- How will "competence" be measured?

Key Questions **(Wealth)**

- ☐ How is "wealth" defined?
- ☐ What assets and income will determine "collective wealth"?
- ☐ What data will be used to determine if the "collective" has achieved "wealth"?
- ☐ How will appropriate personal financial data be collected and vetted for accuracy?
- ☐ How will we evaluate if the proposed Program directly contributed to collective wealth achievement?

Key Questions **(Agency Collaboration)**

- ☐ What is the level of expected collaboration?

- ☐ How many sister/brother agency interactions determine successful collaboration?

- ☐ What criteria will substantiate correct levels of collaboration?

Further Examples

Determine how well a parent **understands** their child's **disability** and how their understanding **improves/stays the same** as [the agency] works with them and their child.

Translation

Parents accurately describe their child's disability.

Key Questions

- ☐ Is this an Outcome?

- ☐ Or is this is an Indicator of change?

- ☐ This is an <u>Output</u> (if we have X then we can work toward Y).

- ☐ Y is the Terminal Outcome.

Examples cont'd

Determine if a parent is becoming a **better campaigner** for their special needs child.

I.e. finding suitable community resources, being pro-active about their child's care, etc.

Translation: **Terminal Outcome**

Parental activities lead to
acquired services.

Key Questions **(Funder)**

- Define the meaning of "campaigner".
- What is meant by "pro-active"?
  - ➢ If pro-activity involves behaviors implicit in interaction with a bureaucracy, then what are the <u>most critical interactions</u> commonly causing difficulties in child advocacy?
- Focus on specific <u>interactions</u> that lead to successful advocacy and define outcomes around them.

Important Point

- ☐ Funders must simplify language.
- ☐ Overly complex RFP's lead to confusion, frustration and unmet Outcomes.

Examples cont'd

What are the most effective ways to measure successful outcomes from **visiting art exhibitions** and/or **participating** in art-making or art-appreciation programs?

Successes in these experiences are typically intangible in nature: increased interest in art, improved self esteem, etc.

And how do we propose to measure these outcomes through good program evaluations that don't require spending $8,000-$20,000?

Translation: **Terminal Outcome**

Museum staff seeks cost effective evaluation in determining program success.

Key Questions

- ☐ Cited intangibles (increased interest, etc.) are subjective and hard to evaluate.
  - ■ What behavior is significant?
    - ☐ *Example:* ***Viewing time for a show****.*
      - ■ The longer one is "viewing" could lead you to hypothesize heightened interest.
      - ■ <u>This is not a outcome</u>. It is a ***formative*** "indicator" of interest, not a ***summative*** statement of increased knowledge.

Questions cont'd

- *Example:* ***Enhanced art appreciation****.*
  - Define "appreciation" and level of "enhancement".
  - Using Pre and Post Survey/Interview attendees before and after program attendance and/or participation.
  - This is a <u>better</u> ***formative*** indicator. It is also more costly. Costs are reduced when existing staff or volunteers conduct the survey.

Questions cont'd

- ☐ The best indicator tracks interest in art over time.
  - ☐ *Example: Increased Membership.*
    - ■ *This is a **summative** indicator of long term commitment.*
    - ■ *Tie increased membership (desire to join and attend/participate in more like events) to a specific program or exhibit.*
  - ☐ *Example: Increased sales of exhibit related merchandise.*

Inherent Conflicts

- ☐ Development (Sales) = Seek funding.
- ☐ Programming (Production) = We want to do the "right" thing.
- ☐ Funder = Look for Agencies that give the "most bang for the buck".
- ☐ Simple clear language achieves better Outcomes.
- ☐ Shared language decreases conflict.

Summary

- Define funder expectations in the form of a **"Terminal" Outcome**.
  - Translate RFP against Outcome.
  - Confirm this Outcome with the funder.
  - Logically formulate objectives, goals, staffing, budget, etc. against Outcome.
- Dialogue must be maintained.