Planning Your Own Adventure: Discovering Tools for Library Programs and Grants Planning

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Workshop Objectives

At the end of this session you will be able to:

• Identify the principles, tools, and best practices of grant/program planning and evaluation.

• Discuss and reflect on how grant/program planning practices could be applied to your grant or program ideas.
Planning Tool #1: Logic Model

Resources/Inputs
- What we invest.
  (e.g., time / effort, money, equipment, expertise, partnerships, travel)

Activities
- What we do.
  (e.g., experiments, research, tools, events, technology, services)

Outputs
- Direct products of activities.
  (e.g., publications, data, students mentored, participants researched, new technology created, new services.)

Outcomes
- Specific changes in knowledge, actions or conditions, broken out into short-term (1-3 yrs.) and medium-term (4-6 yrs.)

Impact
- Fundamental change(s) in a field or community, long-term outcomes (7-10+ yrs.)

Your Planned Work
Your Intended Results
What can they do?

• Facilitate thinking, planning, and communication.

• Help identify outcomes and anticipate ways to measure them.

• Provide stakeholders with a roadmap.

• Can produce an inventory of what you have and what you need to operate your project.
Impact

- The fundamental intended change occurring as a result of the project’s activities.
- Organizational, community, and/or system level changes.
Outcomes

- The specific change in a target audience's skills, attitudes, knowledge, behaviors, status, or life condition.

- Outcomes should be SMART!
  - Specific, Measurable, Achievable, Realistic, Timely
Outputs

- Direct products of project activities

- Usually described in size and/or scope of service and products delivered or produced.
Activities

- What a project does with the resources.

- They are processes, tools, events, technology, and actions that are an intentional part of project implementation.
• Human, financial, organizational, and community resources a project has available (or needs) to direct toward doing the work.

• May include: funding, partners, staff, volunteers, time, facilities, equipment, and supplies.
## Planning Tool #2: Outcome Worksheet

An outcome is a change in a target audience’s:
- Skills
- Attitudes
- Knowledge
- Behaviors
- Status
- Life Condition

<table>
<thead>
<tr>
<th>Short-Term</th>
<th>Medium-Term</th>
<th>Long-Term</th>
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<tbody>
<tr>
<td>Skills</td>
<td>Behaviors</td>
<td>Status</td>
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<td>Attitudes</td>
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<td>Life Condition</td>
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<td>Knowledge</td>
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</table>
Writing Outcomes

1. Answer these questions:

   • How will we know if we’ve succeeded?
   • What will success look like?
   • How will this project contribute to the institutional mission?
   • What difference will it make to users?
Writing Outcomes

2. Draft Outcomes using this structure:

• (Audience) (verb) (observable change).

• Patrons show improvement locating and using research databases to find peer-reviewed scholarly articles.
Writing Outcomes

3. Evaluate your outcomes using the SMART Method.

• **Specific?**
• **Measurable?**
• **Achievable?**
• **Realistic?**
• **Timely?**
Measuring Outcomes

1. Identify Indicators
   • Indicators are measures that indicate whether the change has take place in your target audience’s.

2. Pick your evaluation method/data source
   • (e.g., Interviews, Observation, Surveys, Secondary Data)

3. Identify Targets
   • Targets attach a number to the project’s goals and state expectation for successful performance of outcomes.
## Measuring Outcomes

Outcome 1: Patrons show improvement locating and using research databases to find peer-reviewed scholarly articles.

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Evaluation method/Data Source</th>
<th>Targets</th>
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</thead>
<tbody>
<tr>
<td>The # or % of patrons who are able to identify research databases in their area of study</td>
<td>Survey/Questionnaire</td>
<td>90% of patrons surveyed can identify at least 1 research database pertinent to their area of study.</td>
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<tr>
<td>The # or % of patrons who are able to locate peer-reviewed scholarly articles in a research database focused in their area of study</td>
<td>Survey/Questionnaire</td>
<td>90% of patrons surveyed can identify at least 3 peer-reviewed scholarly articles in a research database pertinent to their area of study.</td>
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### Planning Tool #3: Proposal Dev Timeline

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<tr>
<th>Date</th>
<th>Tasks</th>
<th>6+ mos.</th>
<th>3 mos.</th>
<th>2 mos.</th>
<th>1 mos.</th>
<th>2 wks.</th>
<th>1 wk.</th>
<th>1 day</th>
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<td>(00/00)</td>
<td>Conceptualize the project</td>
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<td>Collect preliminary data</td>
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<td>Build collaborative network</td>
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<td>Seek funding opportunities</td>
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<td>Meet with Grants Admin</td>
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<td>Complete necessary trainings (IRB, COI)</td>
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<td>Dissect the RFP and guidelines</td>
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<td>Contact Grants Admin w/?’s regarding FOA/guidelines</td>
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<td>Set schedule for proposal preparation</td>
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<td>1 - Draft project logic model</td>
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<td>2 - Prepare 1-2 page concept paper</td>
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<td>3 - Prepare a first draft of budget</td>
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<td>Meet with your supervisor for approval</td>
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<td>Contact sponsor program officer w/?’s</td>
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<td>Meet with key personnel</td>
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<td>1st draft of proposal</td>
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<td>Share draft proposal internally for feedback</td>
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<td>Submit draft proposal to sponsor for feedback</td>
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<td>Begin forms (COI, IRB, IACUC)</td>
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<td>Request letters of support</td>
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<td>Prepare subcontract paperwork (if applicable)</td>
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<td>Revise draft proposal using feedback</td>
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<td>Contact sponsor program officer w/any remaining questions</td>
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<td>Polish final draft of proposal</td>
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<td>Submit proposal to internal offices</td>
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These 3 documents will guide you in writing your proposal!
Evaluation Defined: “Evaluation is the production of knowledge based on systematic inquiry to assist in the decision-making about a program [or] judgement or worth of a program”.


Assessment Defined: “Assessment is the systematic collection, review, and use of information about educational programs undertaken for the purpose of improving student learning and development”.


Research Defined: “Research is a process of steps [or approaches] used to collect and analyze information to increase our understanding of a topic or issue. It consists of three steps: Pose a question, collect data to answer the question, and present an answer to the question”.

Planning Tool #4: Lean Canvas

A tool for describing, analyzing and designing business models

- **Patterns**: Looking for patterns and opportunities for grants
- **Design**: and brainstorming grant ideas
- **Strategy**: Making strategic decisions about stakeholders, activities and resources
- **Process**: Grant writing is a process and requires strategies for assessment, evaluation and research

Planning Tool #4: Generic Lean Canvas Template

The Business Model Canvas

- Key Partners
  - Who will help you?
- Key Activities
  - How do you do it?
- Value Propositions
  - What do you do?
- Customer Relationships
  - How do you interact?
- Customer Segments
  - Who do you help?
- Key Resources
  - What do you need?
- Channels
  - How do you reach them?
- Cost Structure
  - What will it cost?
- Revenue Streams
  - How much will you make?
Using LEAN to Plan a Successful Grant or Project

The Business Model Canvas

- Value Proposition
- Design & Strategy: Identifying Partners and Resources, & Defining Activities and Budget
- Strategy & Process: Planning your Implementation & Dissemination Plan

Patterns & Design: Gathering Information for your Value Proposition
Lean Canvas Process

- Patterns
- Design
- Strategy
- Process

Questions to Think About

- What are the patterns or concepts from leading thinkers and innovators in this area?
- What ideas and frameworks will you use to weave the design of your project?
- How will you use different lenses to rethink your value proposition and develop strategy?
- How will you tie together all of the LEAN building blocks to implement and disseminate your idea?
Patterns

Needs Assessment
• Rapid Interview Model to gather feedback
• Real world examples
• SWOT

Literature Review
• Ground in theory and the literature
• Examples of similar projects

Analysis of data collected
• Look for patterns, needs, future research recommendations
• Contexts, challenges, solutions
Design

Ideation – look for that big concept, the ‘hook’, the ‘value added’
- Brainstorm
- Visual thinking
- Storytelling
- Scenarios

Outcomes, Outputs and Activities
- Articulate in logic model
- Alignment to department, library, an institution
Evaluation plan and assessment approaches for what you want to measure
• Data collection strategies

Conceptual framework
• How are the pieces held together?

Focus in on project
• Detail articulation
• Sequencing and snapshot emphasis
• Timeline
Process

Mobilizing teams, resources etc.
  • Who needs to be involved when

Implementation plan
  • Establish phases for the project
  • Organize process

Managing the plan
  • Articulate the process, responsibilities, evaluation, timeline

Disseminating results, findings, and progress
  • Set up a communication and/or dissemination plan
Planning Tool #5: SWOT Analysis (handout)

- With a SWOT you conduct a scan of your environment looking at the Strengths, Weaknesses, Opportunities and Threats.

- Versatile tool can be used in any stage of planning process, especially at the beginning.

- Can be used for group collaboration and visualization of issues.

Source: https://upload.wikimedia.org/wikipedia/commons/0/0b/SWOT_en.svg
Extra Tools

Project Management software
- Trello
- Excel or database software

Data management plan (use the DMPTool)
- Policies
- Data collection processes

For Instructional Projects
- Use a Backward Design alignment grid to align assessment, and teaching and learning activities to outcomes
- Create an Assessment / Evaluation Plan in the beginning
Let’s play a game!

https://crosswordlabs.com/view/tools-for-planning-library-programs-and-grant-projects#cell-0-1


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http://tinyurl.com/ULA2017