MIKE HENDRICKS: Welcome.

And welcome back for those of you who were with us at Module 1.

Thanks for joining us in this video training.

Once again I want to point out that this series of modules is brought to you by the IL-NET, a program of Independent Living Research Utilization in partnership with the National Council on Independent Living and the Association of Programs for Rural Independent Living.

These modules are focused around developing an outcomes focused SPIL, as you can see there, three easy steps.

This is Module 2 of 4 and I am Mike Hendricks.

I do welcome you back.

Before we jump into Module 2 let's do a quick review of Module 1.

It may have been a while since you watched that one.

Or perhaps you missed it completely.

Let's do a quick review.

We talked about three things.

We talked about a state's total IL program.

We talked about an outcome.

And then we talked about a logic model.

Do you remember for the state's total IL program we essentially said that, yes, consumers are the center of it, and yes, absolutely the three key partners, the SILC, the DSUs and the CILs are the core part of the network right around the consumers.

But we also pointed out there are some other organizations and groups still involved, and we urge you when you're thinking about your SPIL and your IL services to think about all of those people as your state's total IL program.

We also when we talked about outcomes, we pointed out that this is the way that the world is now.

Yes, we care about inputs and activities and outputs.

Outputs being basically how hard we're working, the volume of work we're accomplishing, if you will.

But in the world today - outcomes, the changes that are actually resulting because of our activities, that's really what we're caring about these days.

That's really very, very important and so that's what your SPIL needs to be focused more on, that right-hand column there, the outcomes.

And we also then talked about a logic model and what that is, and this was one we worked up for a non-IL program.

This had to do with overweight kids weighing less.

We talked about how everything above this dotted line, our outcomes, the three different levels.

The top level is what -- the ultimate if you will, is what RSA calls is your mission or would call the mission.

The next level down is the goals.

RSA would call those the goals.

And the first level of outcomes there would be the objectives.

All three of those levels are all outcomes.

They're just at different levels.

And then we talked about how below the dotted line, those are the activities that actually need to happen in order to achieve those objectives.

If you have more questions on any of that, you can of course go back and look at Module 1 anytime you want.

But that's a brief overview of what we talked about.

So for Module 2, then, we promised you in our slide at the title we promised you three easy steps.

So let's start delivering on that promise.

The first step, and by the way I would suggest that you follow these three steps in this order.

We're going to walk you through activities and things to do and things to think about.

I would strongly suggest that you do them in this order.

Trust me, they'll make more sense and be more helpful if you do.

So the first one is to decide what you want to achieve.

And that has to do with setting your mission.

Your goals, your objectives, and I've underlined objectives because if you were here in Module 1, you heard me say that objectives is really the key level of outcomes for your SPIL.

And then put that into a partial logic model.

The second easy step then is to turn generalities into specifics.

What do I mean by that exactly?

What I mean is that that first step of deciding what you want to achieve, if you create your partial logic model, that's really, really important, but it's not enough.

It's too general.

It will not help you enough with your SPIL planning.

You must go beyond that and be more specific.

You have to turn those generalities into specifics and here are the kinds of specifics we'll work together to flesh out.

Measurable indicators, what you mean by that objective, the geographic scope, the target performance level you're going to aim for at the end of your three-year SPIL.

And then also target progress between now and year three.

And that's the second easy step.

And then the third easy step, because if you think about it, the first two decide and help you clarify what you want to achieve.

And yet we haven't said how we're going to achieve them.

That's what the third step is about, develop an action strategy to achieve each objective.

And for this, we'll be very carefully laying out the necessary activities, the lead organization, the key partners, the resources needed, and the funding sources.

So these are the three easy steps, and even though you probably haven't created an outcomes focused SPIL before, following these I think you'll find very useful.

Let's start right off.

In this module we're going to talk about this first of the steps, to decide what you want to achieve.

Now, we've got -- to do this, you need to talk about your mission, your goals, your objectives and your partial logic model.

So in this module, you are going to create, you yourselves there around the table, you're going to create the logic model for your SPIL, for your state's total IL program.

And by the end of this 40 minutes or so or hour you're going to have a product.

Let's get you started and first I want to show you an example.

Now, we have to pick some state to use as an example of a SPIL, and we picked the state of Nevona.

I'm sure all of you know Nevona.

Some of you may have traveled or visited there.

Maybe even vacationed there.

Nice place.

Of course, it's hard -- well, it's easy to miss.

Let's put it that way.

As you know it's right on the border between Nevada and Arizona.

So Nevona is right there.

Now I've almost missed it myself driving that way.

But that's exactly where it is.

And they have a fine SPIL that we can use as an example.

And what they had to do at the beginning, and what you'll have to do is to first state your mission.

Do you remember that the mission is, the highest level outcome on your logic model?

So this is where we always start.

We start with the end, where we want to end up, and the question, though, is whose mission?

And our answer of course is your state's total IL program.

I think in Module 1 I mentioned that I read one SPIL, the mission and in fact the entire SPIL was just about the SILC.

No, that's not what we all want.

The mission is for the state's total IL program.

So what is Nevona's mission?

Their mission is persons with disabilities or we'll abbreviate it PWDs, participate as fully as they like in community activities.

That's their mission.

That's where they want to end up at the top.

Now, your mission will be different, I'm assuming because it will be tailored to your state situation.

There's no reason it should be the same.

However, I do think and I would suggest that the wording of how you word your mission can really help you out.

So here's a suggestion I'd make.

Start with your target group.

That's the group or could be the organization you want to change.

Follow that with a present tense verb.

I'm not a fan of future verbs.

I think it's fine to say this is the condition we want or this is the change we want so follow it with a present tense verb and then end it however makes sense.

And if we look up at Nevona's mission we can see they've done that.

They've started with their target group, persons with disabilities.

That's who they're trying to help change.

They follow it with a present tense verb, participate, and then the way it makes sense to end it is as fully as they like in community activities.

So here is in fact, what you would do.

You'd simply put their mission in a box just like this.

Persons with disabilities, PWDs, participate as fully as they like in community activities.

That's the way they started.

That's the way you should start with yours.

Now, don't shortchange your mission.

Obviously it's important but I would also say don't obsess over it either.

If you think about it in some ways it's more a political statement than a planning tool.

And other levels of outcome are far more important for your SPIL, particularly the objectives as we'll see.

So you have your mission now at the top.

And you'll do this yourselves in a few minutes.

Now, remember though we have to ask ourselves what outcomes have to be achieved before we can achieve our mission, and that's what we call the goals.

So the goals are desired outcomes, one level below your mission.

They're the outcomes that need to be achieved first in order for your mission to be achieved.

Another way to think about it is they're the outcomes stepping stones, if you will, on the way to your mission.

Or you could say it this way, if we achieve these goals, then we will achieve our mission.

So you remember this little technique we saw earlier, the if-then; if-then as you work your way up, thanks to our friends at United Way.

This is good.

This is very handy.

So here is the first goal that Nevona has below its mission.

And it's that the persons with disabilities, and again we've abbreviated it to read PWDs self-advocate for their needs.

That's something that they feel obviously by their logic they feel that has to be achieved before PWDs participate as fully as they like in community activities.

Now, it's important to realize that you don't have to agree with that logic.

You may agree.

Or you may not agree.

That's not the point.

The point is that Nevona agrees with that logic.

This is their logic model.

They're laying out their logic for us.

So they have another goal.

IL network members are highly capable organizations.

So this one is about the organizations, not about persons with disabilities.

Here's another goal they have.

Key decision makers are sensitive to the needs of PWDs.

Here's yet a third target group, isn't it, key decision makers.

So - so far we have goals for three completely different target groups.

If you will.

Sufficient resources are available and stable for IL services.

So here the target group are essentially the resources.

Persons previously underserved and underrepresented have more presence and power in the IL network.

This is yet a different target group.

And PWDs in institutions transition successfully into community settings.

So interesting, isn't it, Nevona for their own internal thinking and planning purposes, Nevona feels that there are six different goals, each of which has to be achieved before the mission can be achieved.

So these are their six goals.

Excuse me one second.

So they aren't there by coincidence, it's part of their logic and they've basically said if we achieve each of these six then the mission will be achieved.

And so you can see if we can achieve these six goals then we will achieve our mission.

Now, your goals are going to be different obviously since your mission will be different.

Your goals will be different.

Your state is different.

But again we'd offer that same advice on the wording.

I think it's really useful at all levels of outcomes, mission and goal.

Start with the target group, follow it with a present tense verb, and then end however it makes sense.

Okay, so this is the mission and the goals.

But now we have to ask ourselves what has to be achieved first in order to achieve these goals?

And as you know, that's the next level down.

Those are the objectives.

That's defining your objectives.

Typically you can't achieve goals in three years and as you know, the SPIL covers a three-year period.

You can make progress, yes, on that goal; fully achieve it?

Probably not.

So we need to have this other level of outcomes below the goals called objectives and they're simply what we want to achieve first.

You've heard me say it before.

I'll say it again.

This is the key level of outcomes for both planning and evaluating your SPIL.

It's that if-then logic that we saw once before.

So let's take a couple of examples here.

So Nevona's first goal was that PWDs self-advocate for their needs.

Let's try to get inside their heads.

So what has to be achieved before that can happen?

Well, they say that PWDs have the skills to advocate for their own needs.

So they're saying if they have the skills to advocate for their own needs, then they will self-advocate for their needs.

You know, maybe you'll stop there.

Maybe you'll say that is logical to me.

That makes sense to me.

I think that's fully sufficient.

But Nevona thought something else was needed.

Nevona thought there was another objective they needed to achieve and that was this one, IL network members are organized effectively at the community level.

Now you might ask why do they have that in there?

Well, without talking to them it seems to me what they're saying is having the skills to advocate is one thing, but it's not enough.

There needs to be some mechanism, some support group, that lets them do that self-advocating and they're saying Nevona is saying in their logic, it's the fact that the IL network members are organized effectively at the community level so you take that increased skill by the persons with disabilities, along with this effective IL network members.

You put them together.

If both of those are achieved then people can advocate for their own needs.

So that's their logic.

Those are the objectives.

Let's look at another example here if we can.

Let's take the second goal, if you will.

And the second goal is IL network members are highly capable organizations.

There you go.

So what outcomes have to be achieved for IL network members to, in fact, be highly capable organizations?

This is what Nevona was asking itself, and they said well, network members use modern management tools effectively.

That has to be achieved first.

Another thing they said was historically offered services are restructured -- does it say restructured, are retooled, to maximize dwindling resources.

Historically offered services are retooled to maximize dwindling resources.

That has to be achieved.

And the third one is -- excuse me one second.

Network members undertake entrepreneurial activities and partnerships with other networks and organizations.

Well, that's interesting.

So it seems that part of their thinking, part of their logic is that before IL network members can be highly capable organizations, they need to start doing some entrepreneurial activities.

Again, you may agree or disagree but that's their thinking.

And then the fourth one is those network members in need, and I presume some network members are defined as in need, receive help to enhance their capabilities.

So Nevona says, again, following their logic, that in order to achieve that goal of IL network members being highly capable organizations that there are four objectives down below that need to be achieved first.

Again, you can agree with this logic, you can disagree with this logic.

But the important thing is that Nevona has thought about it, and has put it out as we learned last time in a succinct and very clear way.

So let's look at some actual objectives because it's this bottom line, this bottom line of outcomes objectives that really are the key.

So here's some actual objectives that I actually took out of some real SPILs.

IL network key partners collaborate to provide delivery of services.

PWDs can access transportation.

Formerly underserved populations are served.

PWDs register to vote.

PWDs have increased employment opportunities.

Youth are prepared for leadership roles in our state.

Policy makers financially support the IL network.

So notice a couple of things here.

Notice that all of these start off with the target group, and then they have this present tense verb and then they finish as necessary.

And notice another thing too, that these feel like objectives, don't they?

A lot can be accomplished on these in a three-year period.

Employment opportunities, registering to vote, getting some underserved populations served.

So this -- these feel like they fit at the objective level which is very nice.

Okay.

If that's the idea, if the idea is to make sure we've thought about the objectives that need to be accomplished first, achieved first before the goals can be achieved, then it sort of raises the obvious questions of how many objectives do you need under each goal?

And of course we all know the answer is it depends.

It depends on the particular goal.

You know Nevona had two objectives that had to be achieved before their first goal can be achieved and they had four objectives that had to be achieved before their second goal.

And I don't know how many objectives they would have under the other goals.

But it sounds corny and trite but the proper answer it's the proper number of objectives, however many that is.

You have to think that through yourself.

The only suggestion I would make would be not to bite off too much.

For instance, I read one SPIL that had 37 objectives in it.

That's a lot of objectives.

As you'll see later you have to do something with each and every one of those objectives so that was really biting off quite a lot.

If, in my opinion if you get to the point where your logic model has 37 objectives, then I think you ought to step back and say to yourself, are we biting off too much?

And see how you can reduce basically the scope of the tasks you're trying to achieve.

Okay, so that's an overview of Nevona's logic model.

Now it's your turn.

In a moment, not quite yet, I'm going to ask you to stop this video, and actually create your own logic model, your first draft.

Don't worry, someone said it's like your first omelet, and you know what your first omelet looked like so don't feel too badly about this one.

But your first draft of your logic model and just partial -- I only at this point want you to focus on the outcomes, the part above the dotted line.

So only those three levels of mission, all of your goals, but the objectives under only one of those goals.

Okay.

So not all of your objectives.

Just pick one of your goals and flesh out all of the objectives that you need to achieve first.

So really I'm asking you to think through at least partially what's the top thing you want to achieve, what has to be achieved before that, and then take one of those goals and flesh out completely under it what has to be achieved before we can do that goal.

And work together on this.

This is not an individual project.

This is working together until you have a product that everybody is comfortable with.

And I want to give you a personal tip if I can of how to do this because I've learned the hard way.

If you take a big piece of paper.

I'll take a big piece of paper here.

If you take a big piece of paper and start writing your mission and your goals and your objectives you're going to do so much erasing and scratching and new pieces of paper it's going to drive you crazy.

Don't do it that way.

I've learned the hard way, trust me.

Don't do it that way.

A much better way to approach this task is to take Post-Its or I call them stickies or Post-Its.

This is the four by six size.

This is really an excellent size to use for this, and in fact I even like to use different colors.

Perhaps you can have one color for the mission level and another color for the goal level, and another color for the objectives level.

I think that's a great idea if you want.

Find yourself at least an easel with a big piece of flip chart or ideally a wall.

A wall in an office that has nothing on it.

They stick nicely to the wall.

They come right off.

And put up your mission and then put up your goals and put up your objectives.

Why I say to use these is because you'll change it so many times as you're working on this.

You'll find this trick really, really I think a very helpful way to do that.

So if you want to transfer it to paper afterwards that's up to you, of course.

But I would strongly suggest that you find a wall and some Post-Its and start off doing it that way.

So I want you to stop now but then of course when you finish that then turn the video back on and we'll review basically what you've done.

So turn the video off now, please.

Okay.

Great.

Welcome back.

I hope that was interesting.

I hope it was even fun.

I imagine it took a little bit of work.

Good for you to roll up your sleeves and do it.

Let's review, if we can, your partial logic model in two different ways.

I'm going to offer some suggestions of ways, that you yourselves can review it.

And then we'll see what you think about improving it.

The first way I think you might want to review your logic model there is to ask is it, in fact, logical?

It's a model of logic, so it ought to be logical.

So we say look up up, and that's not a typo, no, because there are two hints we can offer you for looking up your logic model from objectives up to goals up to mission.

And then we have a suggestion for looking down from mission down to goal down to objectives.

And then looking sideways sideways.

We say that twice because we have two suggestions for actually looking sideways on each different level and then we also can suggest did you avoid the most common cow pies?

I live out in the country so there's a lot of cow pies where I live.

So there are some common cow pies and one of them is mixing up objectives and activities.

One is including both an objective and an activity.

One is including more than one concept in an outcome.

Or sometimes we aim objectives too high for a three-year period.

So let's start off with a little bit of reviewing.

I assume you have your logic model in front of you and you can see it on the wall or someplace you have it.

So the first question is as you work your way up, literally physically up, do the if-then connections always seem reasonable.

So let's go back.

Now, you remember in Module 1 we had an example outside the IL world.

It had to do with overweight kids losing some weight and weighing less.

Let's use this as an example to show our five tips here.

So the if-then.

So remember at the bottom we would say if these kids want to eat healthier foods, and they know which foods are healthier, and they have access to healthier foods, then they'll be eating healthier foods.

Well, go back to this.

Does that seem reasonable?

I'm going the wrong way.

Does that seem reasonable to you, the if-then connections?

It seems reasonable to me.

How about the on other side?

If they want to exercise more and they have easy opportunities to exercise and they have consistent exercise partners, then they will exercise more?

Sounds reasonable to me.

Let's do the final step.

If they're eating healthier foods and they're exercising more, then they will weigh less?

Well, that certainly seems reasonable to me.

So the if-then so far sounds good and you should do that with your logic model.

Ask the if-then and see if it makes sense.

Here's a second question and again working your way up.

Is the question why always answered right above each box?

This is different from the first one.

So let's check this one out.

So, why do we want kids to want to eat healthier foods?

Well, the answer to that ought to be right above it.

And yes, in fact, it is.

It is because they're eating healthier foods.

We want them to eat healthier foods.

Why do we care which foods are healthier?

Because right above it then they'll be eating healthier foods.

So if you ask that question why the answer ought to be right above it.

For instance, why do we want them to be exercising more?

Because we want them to weigh less.

So the why sounds reasonable so far, doesn't it?

So far so good.

Now we can work our way down from the top.

And as you can imagine that's a different question.

The question here is how is the question how always answered right below it.

Let's see.

How are we going to get kids to weigh less starting at the top here now?

Well, the answer is by eating healthier foods and by exercising more.

How are we going to get them to exercise more?

By wanting to exercise more.

By having easier opportunities to exercise and by having a consistent exercise partner.

Okay.

Well, that sounds reasonable to me.

So far so good there.

Let's look sideways now.

As you look sideways is the question is this necessary always answered yes?

You know, sometimes we bite off something we don't have to bite off.

We try to achieve an outcome that maybe we don't really need to be achieving.

So it's always important to ask this question.

Is this really necessary?

Let's not make work for ourselves that isn't necessary.

So again let's take a look, and maybe on the right-hand side might be a good example.

Let's look at those objectives, the bottom line there.

Okay.

I've said that it might be good for the kids to want -- as a matter of fact, it might be necessary for kids to want to exercise more and to have easy opportunities to exercise, but then I think in Module 1 I pointed out you might agree or disagree that it's also important for them to have consistent exercise partners.

I'm going to say, yes, that outcome is necessary.

It is necessary for them to have consistent exercise partners.

But this might be a place where you say, no, I don't think that one is necessary.

I think wanting to exercise more and having easier opportunities to exercise will in fact lead to them exercising more, and if that's the case more power to you because it means less work for you.

You don't have to find other partners, you don't have to match them.

Makes your job easier, that's fine.

So this is why it's important to ask that question, is this necessary?

This may be an example where you think it's not.

Look at your logic model with that same question.

Finally here's the last question about the logic of your logic model, if you will, also looking sideways is the question what else is needed?

Always answered nothing else.

You know, smart as we sometimes think we are we may have forgotten something.

Let's look here and see maybe on the left-hand side.

So okay, we've got the kids wanting to eat healthier foods, knowing which foods are healthier, and having access to healthier foods.

To me all three of those sound necessary.

I'm pretty willing to say that all three of those are necessary.

I'm trying to think now have we left something out?

Is there something else that has to be achieved before they'll, in fact, be eating healthier foods?

I don't know.

Maybe you might say kids have to see their peers eating healthier foods or something else.

I really don't know.

For me I can't think of one.

That's the kind of question you want to ask yourself.

Have we forgotten something?

If we've forgotten something, then our efforts may not achieve what we want so that's kind of an important question.

So that's one way to think about it.

These are five very good questions in my opinion and I'll go back because it's hard to sometimes remember them like this.

So here's a very nice little graphic, in my opinion, which will help you see these five different useful questions.

So as you can see as you go up the two questions are if-then, does that make sense and why?

As you go down, you can see that the question is how and how should be answered right below it, and then as you go to the sides, one question is - is it necessary?

And the other question is what else?

Well, you can apply those five questions to Nevona's second goal and you can ask those two questions going up, one question going down, and two questions going sideways, and it will help you see if there's any logical flaws in Nevona's goals.

But more importantly you can apply it to your own logic model, the one you just did and it will help you see it.

So that's one set of questions to ask.

Here's the other set of questions to ask.

Did you make sure not to step in those cow pies?

Do you remember those?

And the first one is to mix up objectives and activities, and frankly, as I think I've mentioned before, I've seen that.

I've seen that before so let's remember that objectives are the changes that you want to result.

That's the first level of outcomes above the dotted line, and then activities are what's going to be done.

Now let's look at some real examples here.

So these are some objectives that I've actually pulled out of SPILs and let's look at them.

A working group will propose a more equitable funding formula.

Okay.

Is that an objective, is that a change that you want to have in the world or is that something that the IL program in your state is going to do?

How about the next one.

Support a statewide nonpartisan disability voter rights network.

Provide information and referral assistance.

Designate funds for the purposes of.

The SILC will host a meeting inviting RSA to do something.

Provide for $30,000 capacity building grant opportunities.

So I would ask you to look at these -- how many are these, one, two, three, four, five, six, and ask yourself are these objectives?

Are these changes we want to see in the world as a result of our activities or do these more describe activities?

What's going to happen?

And I think you'll probably agree with me that these describe activities.

Proposing a formula, supporting a network, providing INR services.

These are activities.

Every single one of these was listed in a SPIL as an objective.

Not being critical, just pointing out this can happen and we need to be careful not to do this.

So here's another question is sometimes it's easy to sort of merge the two together.

So in what you're calling an objective do you have both an objective and activity?

You don't really want that to happen.

Here's an real world example, by the way.

Persons with disabilities are able to remain in their homes through the provision of person-centered and coordinated home and community-based services.

Well, that's a great idea but that's got both an objective and an activity in there, doesn't it?

The first part is an objective.

Persons with disabilities are able to remain in their homes.

Great, that's the change we want in the world.

But then this SPIL went on and said how they're going to do it through the provision of person-centered and blah blah blah.

So just don't do that.

Make sure that in your objectives you have just the objective.

How about this, how about more than one concept in an outcome or in an objective?

Sometimes this happens.

So for instance, local and state-wide barriers to independent living are identified and systems advocacy strategies are implemented.

Well, let's see, let's look at that.

Local and statewide barriers to independent living are identified.

We could call that an objective perhaps depending how we word it.

And systems advocacy strategies are implemented.

Again, we might reword it.

But that could be called an objective.

But it's two, it's two in one and we don't want to do that for reasons you probably already know and we'll see more later.

You really want one concept in an objective.

How about this one, improved capacity and quality of community-based long-term supports.

Well, hey, both are great.

Improved capacity is important.

Improved quality is important.

But they're two different things, right?

Let's separate them out.

And how about this last one, the needs of persons with disabilities are identified and addressed.

Great to identify them, great to address them.

Two different concepts, though.

Here's another one, have you aimed your objectives too high for a three-year period?

Nevonans with disabilities have access to safe, affordable and accessible transportation options throughout Nevona.

By the way, I wasn't sure whether persons who live in Nevona are Nevonans or Nevanarians.

So I called the governor's office and they told me, yes, they were called Nevonans.

The question, though, is this too high?

Can you accomplish this in a three-year period throughout the entire state?

We saw how rural it is that they have safe, affordable, and accessible transportation options throughout the entire state.

I would suggest that's a little high for a three-year period.

So I think that one may be a case where we aimed too high.

And your turn now is -- your challenge now, if you will, is to improve this logic model that you started.

So in a second I'm going to ask you to stop this video again.

As a group review your logic model, considering those five questions we asked about your logic.

Is your logic solid throughout?

I hope it is.

And then did you avoid the most common cow pies.

I think what we gave you four questions to ask about that.

And then literally revise your logic model based on this review.

Move those Post-Its around.

Write new Post-Its.

Throw away old Post-Its.

Literally revise it.

Engage with this, roll up your sleeves.

Revise it.

This is your real logic model.

And then basically congratulate yourselves on learning step one.

That's what you will have done.