

## Grant Writing for Homeless Programs January 29, 2009

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Coalition on Homelessness and Housing in Ohio

## Performance Measurements: Understanding Outcomes & Outputs



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## Speaking the Language

Widgets  
Means  
Activities  
+ Quantity  
Outputs/Activities



Results  
Ends  
Benefits  
+Quality  
Outcomes/Results



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## Outputs (Number or Volume of Things Done)

Quantity examples:

- Number of houses built
- Number of counseling sessions held
- Number of jobs created
- Number of participants served
- Volume of educational materials distributed



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## Outputs - Continued

- Outputs may be measured over time
  - Year 1
  - Year 2
  - Year 3
- Should be consistent with "Soundness of Approach" section from grant narrative



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## Activities



Services of the program to fulfill mission

- Sheltering homeless families
- Educating public about homelessness
- Providing adult mentors to youth
- After school tutoring

Activities create the outputs



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## Outcomes

Outcomes are benefits to:

- Individuals
- Families
- Organizations
- Communities

... From their participation in a program or service



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Outcomes are always measurable and answer the other big question:

**So What????**



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## Outcomes - Continued

- Increase in participants' knowledge
- Change in how participants think
- Change in what participants can do
- Change in participant behavior
- Change in participant conditions as a result of the program



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## Why Measure Outcomes?

Outcome measurements perform important functions:

- Serves as a learning loop that feeds information back into programs on how well they are doing
- Provide findings that organizations can use to adapt, improve, and become more effective.



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## Benefits of Measuring Outcomes

For Managers:

- Describe what is actually going on and how well it is being done
- Describes what are meaningful data
- Focuses work efforts and help staff measure accomplishments



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## Outcome Language

20 Families Receiving Case Management

- 5 families increased income by 20%
- 4 families obtained affordable housing
- 1 person purchased a home
- 3 persons received their GED
- 1 person completed certified training class
- 1 person opened a child-care center, and
- 5 families have not met any of their goals



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## Outcomes Characteristics Checklist

### CHECKLIST



- ✓ Measurable
- ✓ Simple, clear and understandable
- ✓ Realistic
- ✓ Manageable
- ✓ Identifies a specific group of clients
- ✓ Specifies a time frame
- ✓ Measures an end, not a means to an end
- ✓ Outcome measures are taken after service has been delivered



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## Classic Mistakes When Writing Outcomes

- Service is stated as an outcome
- Projected outcome cannot occur within the expected time frame
- Performance is under or over estimated
- Limited relationship correlation between activities, outputs, & outcomes



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## Logic Model



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## HUD's Logic Model

- Multi-purpose tool
  - Planning
  - Program management
  - Monitoring and reporting
  - Evaluation
- Executive summary of the application
  - Integrates operations and accountability



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## Logic Model - Grants Management

1. Establish performance goals
2. Express goals in objective, quantifiable & measurable form
3. Describe operations, skill, technology, staffing, information or other resources needed to reach goals



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## Logic Model - Grants Management - Continued

4. Establish performance indicators to measure outputs, service levels and outcomes of each activity
5. Provide a basis for comparing actual results with goals
6. Describe means used to verify & validate measured values



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## 5 Components for Program Management - Operations

The logic model supports the five fundamental components for managing a program:

1. Identification of need - presenting problem/challenge
2. Activities/interventions - program resources to address the need



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## 5 Components - Continued

3. Outputs - counts of persons receiving services or units produced
4. Outcomes - the results achieved by people or organizations
5. Measuring performance - collecting and using data to provide evidence of actual outputs and outcomes achieved.



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## Five Components for Program Management

- The function of the logic model is to integrate program operations with program accountability
- All five components must work together for a program to operate in an efficient and effective manner



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## What is a Logic Model? Program Accountability

- Program accountability includes:
  - Identification of sources of data
  - Data collection practices
  - Reporting
  - Measuring performance
- The logic model is a tool that uses data from program operations and accountability processes and can be used to answer key management and accountability questions.



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## Program Design

- When HUD funds a program, it expects the recipient to be a steward of the public trust and actively manage the program for performance and results.
- Building your logic model goes hand in hand with the design of your program. HUD's logic model, also called eLogic Model, is built to reflect the fundamental statutory purposes and eligible activities for each program.



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## Program Purpose and Program Operations

- When creating your eLogic Model you should look at the overall purpose of the program as stated in the NOFA and the logic model.



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## Tying your Program Narrative and eLogic Model Together

1. Read the NOFA
2. Print out and read column 2, 3, & 5 drop down menus from eLogic Model
  1. Column 2 - Need
  2. Column 3 - Activities
  3. Column 5 - Outcomes



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## Tying it Together

- By taking those initial steps will allow you to better formulate and articulate your proposed project and expected outcomes related to the purpose of the program and the need that you are trying to address.

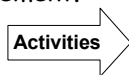


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## Tying it Together

- HUD has identified in the eLogic Model a range of activities that are eligible for funding. You should relate those activities and the needs expressed in your narrative statement.



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## Tying it Together

- The eLogic Model requires the applicant to project outputs for activities or interventions (Columns 3 & 4) as well as to project expected outcomes (Columns 5 & 6).

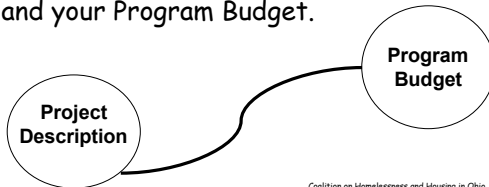


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## Tying it Together

- The activities you select from Column 3 should also be incorporated into your narrative Project Description and your Program Budget.



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## Tying it Together

- As an applicant, you are using the eLogic Model to project the activities/outputs and outcomes with the funds that are available. As a successful grantee, you will use the eLogic Model to measure the actual outputs and outcomes achieved against your initial projections.



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## Program Accountability



- In Column 7, the eLogic Model addresses accountability by identifying:
  - Sources of Data
  - Data Collection Practices
  - A Reporting Framework



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## Program Accountability - Continued

- Identification of these accountability tools at the inception of the project ensures that you will be able to account for, report, and evaluate how well you manage your project and achieve your stated outcomes.



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## Reporting

- The frequency of reporting is identified in the NOFA.
- Grantees must include a completed eLogic Model indicating the results to date with each required report to HUD.



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## Reporting



- Even if HUD only requires a semi-annual or annual report, a grantee should review its output and outcome data on a regular basis.



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## Reporting

- If the projected targets are not being met, the program manager should look at the available data and the operations of the organization and make changes where indicated.



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## Evaluation

- The eLogic Model contains key evaluation and management questions based on the Carter-Richmond Methodology\*. The questions and their responses can be answered using the data identified in the eLogic Model and occasional outside sources of data.

*\*The Accountable Agency - How to Evaluate the Effectiveness of Public and Private Programs*



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## Evaluation

The Carter-Richmond Methodology	Columns of the Logic Model	Location in the NOFA
How many clients are you serving?	Column 4	Approach
What services do you give them?	Column 3	Approach
Who are they?	Column 3	Need
What does it cost per service delivered?		Budget & Approach

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## Evaluation

The Carter-Richmond Methodology	Columns of the Logic Model	Location in the NOFA
What happens to the clients as a result of the service?	Column 5	Result & Evaluation
What does it cost per outcome?		Budget, Results, & Evaluation
What is the value of a successful outcome?	Column 7 & Evaluation Tab	Calculation

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## Evaluation

The Carter-Richmond Methodology	Columns of the Logic Model	Location in the NOFA
What is the return on the investment?	Column 7 & Evaluation Tab	Calculation
What does it cost?		

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## Use of Drop-Down Menus - Need

- The drop down menus provide the applicant/grantee with fixed choices in each component of the eLogic Model: Need, Activities, Outcomes.

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## Use of Drop-Down Menus - Need

- In Column 2 - Need, there are at least 2 Statements of Need for any program. The applicant can choose one or any of the Statement of Need to apply to their grant application.

Problem, Need, Situation
2
Planning



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## Use of Drop-Down Menus - Activities

- In Column 3 - Services or Activities/Output, there are many choices in the drop down menu for any program. These services or activities are automatically associated with their respective Units of Measure or Outputs in Column 4.

Services or Activities/Outputs
3
Programming



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## Use of Drop-Down Menus - Activities

- The applicant can choose as many activities as they are undertaking that address the Statements of Need Identified in Column 2.



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## Use of Drop-Down Menus - Outcomes

- In Column 5 - Outcomes, there are many choices in the drop down menu for any program. These Outcomes are automatically associated with their respective Units of Measure or Outputs in Column 5.

Outcome
5
Impact



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## Use of Drop-Down Menus - Outcomes

- The applicant can choose as many activities as they are undertaking that address the Services or Activities identified in Column 3 and the Statements of Need identified in Column 2.

Problem, Need, Situation	Services or Activities/Outputs
2	3
Planning	Programming



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## Use of Drop-Down Menus - Outcomes

- Program narrative must include a description of the Statement of Need, Activities/Services and the expected Outcomes.



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## Projecting and Reporting

- The eLogic Model requires the applicant to project outputs for Activities or Services. These are placed in Column 4 labeled "Pre". The eLogic Model requires the applicant to project expected Outcomes. These are placed in Column 6 labeled "Pre". Changes can be made to the projections during the negotiation phase with the program office.



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## Projecting and Reporting

- When reporting back to HUD, the grantee will report the actual Activities or Services by using Column 4 labeled "Post" and the actual Outcomes by using Column 6 labeled "Post".
- The "Pre" and "Post" columns allow for comparison of projected and actual results.

Measure		
4	6	6
Pre	Post	YTD



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## Accessing the e-Logic Model

- Select the tab labeled "Year 1" to enter grant Year 1 data. "Year 1" is the first worksheet following the instructions tab.
- The additional tabs in the form labeled Year 2, Year 3, and Total are used for multiple year grants to specify activities and outputs for each year of the proposed program.



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## Accessing the e-Logic Model

- Year 2, for example, would contain Activities and Outcomes projected for the second year **ONLY** (not a cumulative total from Year 1).
- Applicants applying for a multiple year grant should complete a worksheet for each year of performance, plus a total worksheet showing a cumulative total for all years covered by the award.



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## Accessing the e-Logic Model

- The "Total" worksheet should reflect the sum of all years of the grant. For example, a two year grant would include the worksheets for Year 1, Year 2 and Total.
- A three year grant would include the worksheets for Year 1, 2, 3 and Total.
- A one year grant would include **ONLY** Year 1. A Total worksheet is not required for one year grants.



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## Completing the e-Logic Model

- Note: Each cell of the worksheet is "lock protected" so you can only make entries in cells that are for input as directed by these instructions.



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## Completing the e-Logic Model

- To complete the logic model form, in the first row there is a label, "Applicant Name", cell {E1}. Enter the name of the applicant organization applying for funding. Use exactly the same name as on other parts of the application (if renewal project - use what HUD has as your name).



Applicant Name:

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## e-Logic Model

- In the second row there is a label, "Project Name:" Enter the name of the project in cell {E2}. Use exactly the same name as you did on other parts of your application and the form SF-424.
- Immediately below "Project Name," there is a field for "Term," which corresponds to worksheets for Year 1, 2, 3, or Total. This field is pre-filled.



Project Name:

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## e-Logic Model

- HUD Program Name - this field is already pre-filled; please verify that it matches the program for which you are applying.



HUD Program:

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## e-Logic Model

- You will also see a field labeled  "Component Name:", cell {L4}.
- If the program under which you are applying has components, such as Shelter Plus Care or Supportive Housing Program, enter the name of the program component for which you are applying.
- If there is no components in the funding opportunity for which you are seeking funding, leave this field blank.



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## e-Logic Model

Period:	
Start Date:	
End Date:	

- To the right of the Applicant and Project fields, there are fields labeled Period and Start Date and End Date. Leave these fields blank.
- These fields are locked and if selected for funding HUD will open these fields, allowing later use for reporting performance to HUD.
- When actually reporting performance on your approved Logic Model form, you will be able to enter a Start Date and End Date that reflects the reporting period you will be submitting in accordance with required reporting time frames.



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## e-Logic Model - Reporting

- When reporting, for the Start Date, enter the start date of the reporting period. For the End Date enter the end date for the reporting period. When entering the dates, use the format MM/DD/YYYY.



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## Column 1 - Policy

- Under the "Policy" column (1), there are actually two columns; one for HUD Goals, and one for Policy Priority. Review the HUD Goals and Policy Priorities by clicking on the tab labeled "Goals/Priorities" at the bottom of the screen.

HUD Goals	Policy Priority
↓	
Policy	



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## Column 1 - Policy

- For each of the eLogic Model worksheets used in your application (Year 1, 2, 3, & Total) select the HUD Goals and Policy Priorities that your program will address. You do this by clicking the mouse in one of the cells in column (1). HUD goals and policy priorities may be the same for all years of your award or you may elect to focus on particular sets of goals and priorities during the different years.



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## Column 1 - Policy

- A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of letters and numbers that correspond to the HUD Goals and Policy Priorities will appear.
- Select one of the HUD Goals and Policy/Priorities letter/number in the list by clicking it. Repeat this process in other cells of Goals column and the Priorities column until you have selected all that apply to your application.



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## Column 2 - Planning

Problem, Need, Situation
2
Planning

- Under the "Planning" column (2), select a Need Statement. You do this by clicking the mouse in one of the cells of the column. A little dropdown arrow appears.
- Click the dropdown arrow and a dropdown list of Need Statements appears. Select one of the Need Statements in the list by clicking it. Because the column is too narrow to show the full Need Statement in the dropdown list, you may wish to refer to the printout of "Tab 1 Needs List" to see the full Need Statement.



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## Column 2 - Planning

- When you select a Need Statement, the full Need Statement will fill the cell. If you don't want this Need Statement, you can simply click the dropdown arrow again and select another item. Or you can delete a Need Statement by selecting the cell and clicking the Delete Key on your keyboard.



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## Column 2 - Planning

- If you want to select more than one Need Statement, go to the next cell in the column and repeat the process, selecting the appropriate Need Statement.
- You can do this until you have selected all the Needs Statements that are appropriate to your proposed program.



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## Column 2 - Planning

- The selections should reflect the needs identified in your response to your Rating factor narratives.
- There is no need to select all the Need Statements if they do not apply to what you plan to address or accomplish with the funding requested.



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## Column 3 - Programming

Services or Activities/Outputs
3
Programming

- Under the "Programming" column (3), select an Activity (or Service). You do this by clicking the mouse in one of the cells of the column. A little dropdown arrow appears.
- Click the dropdown arrow and a dropdown list of eligible Activities appears. Select one of the Activities in the list by clicking it.



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## Column 3 - Programming

- Please list Year 1 activities on Year 1 tab, Year 2 on tab 2, Year 3 on tab 3, and Total on tab Total.
- The Total Tab should be a composite of all years of a multiple year grant.
- NOTE: if you want to align particular activities to specific needs or outcomes, skip lines in the logic model before making the next selection. There is ample space in the eLogic model to allow you to do this.



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## Column 4 - Measure

Measure
4
Pre Post YTD

- Notice that as the Activity you selected appears in the cell, a corresponding unit of measure appears or populates in the next column labeled "Measure".
- The unit of measure could be "persons, dollars, houses, etc." or some other unit of measure that relates to the selected Activity. Immediately below the unit of measure are two blank cells.



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## Column 4 - Measures

- Enter the projected number of units you are proposing to deliver or accomplish in the "Pre" column. The "Post" column is locked to be used later for reporting purposes.
- The number entered should be appropriate to the unit of measure and the activity. For example:
  - Households must be in whole numbers
  - Construction of a new facility equals one facility



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## Column 5 - Impact

Outcome
5
Impact

- Under the "Impact" column (5), select the Outcome that would correspond to the Need and Activity along this row. You do this the same way as previously described for Needs and Activities.
- Select an Outcome from the dropdown list. Notice, once again, that a unit of measure automatically appears in the next column labeled "Measure".



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## Column 6 - Measure

Measure		
5		
Pre	Post	YTD

- Under the "Measure" column 6, specify a projected number of Outcome units you are proposing.
- The number entered should be appropriate to the unit of measure and the activity. For example:
  - \* *Establishment of a project-based PSH equals one PSH.*



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## Column 6 - Measure

- Repeat the process of specifying a Need, a Service, or Activity, and an Outcome using as many rows as is necessary to fully describe your proposal.
- The eLogic Model form extends to about 3 pages when printed out.
- You may wish to click on Print Preview to get a better view of the logic model as you are creating it.



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## Advice

- NOTE - you can adjust the look of the e-Logic Model by skipping rows, so that Needs, Activities, and Outcomes are grouped accordingly.
- DO NOT cut and paste items from one column to another. The worksheet will become unstable and will behave erratically.



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## Column 7 - Accountability

Evaluation Tools
7
Accountability

- Under the "Accountability" column (7), enter the tools and the process of collection and processing of data in your organization to support all project management, reporting, and responding to the Management/Evaluation Questions.



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## Column 7 - Accountability

- This column provides the framework for structuring your data collection efforts. If the collection and processing of data is not well planned, the likelihood of its use to further the management of the program and support evaluation activity is limited.
- If data are collected inconsistently, if data are missing, if data are not retrievable, or if data are mishandled, the validity of any conclusions is weakened.



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## Column 7 - Accountability

- The structure of column 7 contains five components in the form of dropdown fields that address the Evaluation Process. You must address each of the five components that are critical to your project:
  - Tools for Management
  - Where Data Maintained
  - Source of Data
  - Frequency Collection
  - Processing of Data



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## Column 7 - Accountability

- You may select up to five choices for each of the five processes (A-E) that supports Accountability and tracks Outputs and Outcomes.
- Given the limited space, please identify the five most frequent sources for the five process.



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## Column 7 - Accountability

- As you proceed through the remaining components B-E, specify those components in the same order as the Tools selected in A.



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## Column 7 - Accountability

- That is, if the first Tool is "Pre-Post Test", then specify the first item in B-E as it pertains to "Pre-Post Test". Likewise, if the second item in A is "Satisfaction Surveys," then specify the second item in B-E as it pertains to "Satisfaction Surveys."



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## Tools for Measurement

A. Tools for Measurement

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- A device is needed for collecting data; e.g., a test, a survey, an attendance log, an inspection report, etc. The tool "holds" the evidence of the realized Output or Outcome specified in the logic model.



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## Tools for Measurement

- At times, there could be multiple tools for a given event.
- It is important for the measurement tools to remain consistent throughout the project and be reliable.



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## Tools for Measurement

### Instructions:

- Under the Accountability column, select your choices of Tools to Track Outputs and Outcomes. You do this by clicking the mouse in one of the cells of this column.
- A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of Tools appears.



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## Where Data Maintained

B. Where Data Maintained

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- A record of where the data or data tool reside must be maintained. It is not required that all tools and all data are kept in one single place. You may keep attendance logs at the main office files, but keep other tools or data such as a "case record" in the case files at the service site.



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## Where Data Maintained

- It is important to designate where tools and/or data are to be maintained. For example, if you program has a sophisticated computer system and all data is entered into a custom-designed database, it is necessary to designate where the original or source documents will be maintained.



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## Where Data Maintained

### Instructions:

- Under the Accountability column, select your choices of Where Data Maintained. You do this by clicking the mouse in one of the cells of this column.
- A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of Where Data Maintained appears.



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## Source of Data

C. Source of Data

- This is the source where the data originates. Please identify the source and make sure that it is appropriate.

### Instructions:

- Under the Accountability column, select your choices of Source of Data. You do this by clicking the mouse in one of the cells of this column.



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## Frequency of Collection

D. Frequency of Collection

- Timing matters in data collection. In most instances, you want to get it while it occurs. Collect data at the time of the encounter; if impossible, when it is most opportune immediately thereafter.



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## Frequency of Collection

- For example, collect attendance of financial literacy class after the class. Do not wait until the end of the program year.
- Reporting can be done at anytime if the data is already collected. Another important aspect of this dimension is consistency.



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## Frequency of Collection

- If some post tests are collected soon after the event, but others are attempted months later, the data are confounded by the differences in the timing.
- If some financial data are collected at the middle of the month and others at the end of the month, the data may be confounded by systematic timing bias.



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## Frequency of Collection

### Instructions:

- Under the Accountability column select your choices of Frequency of Collection. You do this by clicking the mouse in one of the cells of this column. The dropdown arrow appears - click on the dropdown list.



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## Processing the Data

E. Processing of Data


- This is where you identify the mechanism that will be employed to process the data.
- Some possibilities are: manual tallies, computer spreadsheets, statistical database, etc.



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## Processing the Data

- The eLogic Model is only a summary of the program and it cannot accommodate a full description of your management information system. There is an implicit assumption that the grantee has thought through the process to assure that the mechanism is adequate to the task(s).



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## Processing the Data

### Instructions

- Under the Accountability column, select your choices under Processing Data. You do this by clicking on the cell. A dropdown arrow appears, select from the dropdown list.



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## Saving Your eLogic Model

- When you are finished completing the eLogic Model form, or wish to stop and continue later, save the file by going to Excel's menu bar and choosing File-Save As.
- Then specify a name for the file and note where it is being saved.
- It is suggested that you use the name of the HUD Program and your organization name to form a file name for your Logic Model; e.g., CoC-COHHIO.xls



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## Saving Your eLogic Model

- Excel automatically adds the file extension ".xls" to the file name.
- You will attach this document to your Exhibit 2/Application.
- Be sure to delete any earlier version so that when you go to attach the file to your application you select the appropriate and final file.



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## Saving Your eLogic Model

- In most cases, a single workbook will suffice.
- The workbook has three copies of the form included.
- If you need additional space, you may submit additional copies of the workbook as needed.



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## Saving Your eLogic Model

- The eLogic Model will be used as a monitoring and reporting tool upon final approval from the HUD program office.
- HUD will compare the projected pre-activity and outcomes that have been entered into column 4 & 6 (Measure), with the actual post, experience resulting from implementation of your program/project.



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## Saving Your eLogic Model

- Your projections are entered into the Pre column of Measurement for Activities and Outcomes. The actual experience of your program will be reported by entries into the Post column of Measurement for Activities and Outcomes.
- You make your entries into Post column LATER with resubmission of your eLogic Model at end of Year 1, 2, 3, etc.



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## Reporting Tab

- The worksheet labeled "Reporting" contains a large text box which will be used in subsequent reporting using the Logic Model by applicants who receive awards.
- This space is provided for adding commentary to explain variances between projected Activities and Outcomes vs. Actual Activities and Outcomes.



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## Reporting Tab

- This space is also provided to respond to the management questions found in the Evaluation Tab. Please see the instructions contained the Reporting Tab.
- When using the Reporting Tab, you can increase the length of the Text Box by clicking and dragging on the "resizing handle" at the bottom of the Text Box.



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## Evaluation Tab

- The worksheet labeled "Evaluation" contains one large text box describing the evaluation process HUD will use.
- It also lists the relevant "Management Questions" that likely apply to your proposed program. Your eLogic Model should be able to address most or all of these management questions.



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## Evaluation Tab

- There may be situations where your program is not proposing to engage in some of the eligible activities or pursue some of the target outcomes and so certain management questions may not apply.



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## Evaluation Tab

- Most or all of the questions will apply and these can be useful to you in building your Logic Model and in designing your Evaluation Plan.
- Applicants who receive awards will be notified about which management questions will be used for monitoring accountability throughout the project.



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## Overview

- Was the Applicants Name identified {E1} in all the applicable worksheets?
- Was the Project Name identified {E2} in all of the applicable worksheets?
- Were the fields to the right of the Applicant and Project fields labeled Period and Start Date and End Date left blank (in all of the applicable worksheets)?



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### Overview - Columns 1-3

- Were the HUD Goals & Policy Priorities (Column 1) identified in all applicable worksheets?
- Were the Problem/Need Statement identified (Column 2) identified in all applicable worksheets?



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### Overview - Columns 1-3

- Were the Services or Activities (Column 3) identified in all applicable worksheets?
- Does the Problem/Need Statement match the Service or Activity Columns (2-3), in all of the applicable worksheets?



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### Overview - Columns 4-6

- Does each Service or Activity have a unit of measure and number identified (Column 4, Pre) in all applicable worksheets?
- Is the number entered for the projected output and outcome appropriate to the unit of measure or the activity?



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### Overview - Columns 4-6

- Were the Outcomes identified (Column 5) in all applicable worksheets?
- Does each Outcome have a unit of measure and number identified (Column 6, Pre) in all applicable worksheets?



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## Overview - Columns 4-6

- Do the Service or Activity statements match the Outcome statements (Column 3-5) in all applicable worksheets?



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## Overview - Column 7 & Summary

- Have the Evaluation Tools been identified (Column 7, A thru E) in all applicable worksheets?
- Are the projections for the Service/Activity and the Outcome realistic, clear, and attainable (Column 4-6) in all applicable worksheets?
- Is there only one program reflected per workbook?



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## Reference Materials

- "The Art & Science of Grant Writing"  
- Center for Faith-Based & Community Initiatives & HUD



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