INSTRUCTOR'S MANUAL

Shaping Outcomes:
Outcomes-Based Planning and Evaluation

- *Shaping Outcomes* project Website:
  http://www.shapingoutcomes.org/course

- Instructor materials:
  http://www.shapingoutcomes.org/Instructor_manual.pdf

- E-mail:
  outcomes@iupui.edu

Send changes, additions or corrections for the Instructor's Manual to Project manager at outcomes@iupui.edu

Edited 28-Jan-09 by sbk

Welcome to *Shaping Outcomes*!

Created especially for libraries and museums, ***Shaping Outcomes*** is a Web-based tutorial that teaches participants how to plan projects with **outcomes** in-mind.

Participants learn to create a program with realistic, achievable goals and outcomes using the *OBPE* (<u>o</u>utcomes-<u>b</u>ased <u>p</u>lanning and <u>e</u>valuation) method.

The <u>Instructor's Manual</u> provides *Shaping Outcomes* instructors and facilitators with basic background information and materials that you will need to teach *Shaping Outcomes*, either as a stand-alone distance learning course or workshop, or as a unit embedded in a larger course.

We welcome your comments, questions, and feedback. E-mail our project managers at outcomes@iupui.edu

Enjoy your *Shaping Outcomes* experience!

TABLE OF CONTENTS

APPENDICES

FIGURES AND SCREEN CAPTURES

A. Introduction to *Shaping Outcomes*

Welcome to Shaping Outcomes!

Shaping Outcomes is an online, Web-based course for learning <u>o</u>utcomes-<u>b</u>ased <u>p</u>lanning and <u>e</u>valuation (*OBPE*).

OBPE is a process for planning programs and projects. *(From now on, we'll use the word 'programs' to describe any of the projects or programs that students or participants can develop in this course.)*

Through the *Shaping Outcomes* course, participants will plan and run a program using the outcomes-based planning and evaluation (*OBPE)* method. The course can be run in a variety of formats: 3-hour or one-day workshops, or as a course that runs anywhere from one to six weeks.

Participants have the opportunity to develop a real program – with defined beginning and end-points – for implementation in their own workplaces.

> *Shaping Outcomes* can be used as:
>
> - A self-paced online tutorial
> - An instructor-mediated distance learning course
> - A curriculum for library science and museum studies courses
> - The basis for in-person or distance learning courses

How is the Instructor's Manual Organized?

This Instructor's Manual is organized into multiple broad categories, with sub-categories in each. The major categories are:

A. Introduction to *Shaping Outcomes*
B. The Logic Model
C. Characteristics of OBPE Programs
D. Benefits of Practicing OBPE
E. How is the *Shaping Outcomes* Tutorial Organized?
F. Overview of Tutorial Modules A - E
G. Moodle
H. Shaping Outcomes Wiki
I. Teaching *Shaping Outcomes*
J. About *Shaping Outcomes*: Background and Contacts

Appendices include useful handouts and help guides for instructors and to pass along to participants. The appendices are organized into three broad categories:

1. Materials for Teaching and Administering *Shaping Outcomes*
2. The OPBE Process
3. Logic Models

Use the clickable Table-of-Contents and embedded links to move from section to section in the *Instructor's Manual*.

INSTRUCTIONS FOR GETTING STARTED WITH THE TUTORIAL

Welcome to Shaping Outcomes!

Shaping Outcomes is an online, Web-based tutorial from the IMLS to help museum and library professionals learn more about *OBPE* (outcomes-based planning and evaluation).

The *Shaping Outcomes* course will:

- Introduce participants to the basic concepts and terminology of outcomes-based planning
- Help participants better articulate how their programs makes an impact
- Give participants the tools to demonstrate a program's value to funders and stakeholders
- Provide participants with ways to help unite project teams around big ideas and goals

In the *Shaping Outcomes* course, participants will learn to create a program with realistic, achievable goals and outcomes using OBPE.

The course uses several learning and communications tools:

1. **Wiki**
   Here you will be able to access all of course instructions, submit assignments, participate in discussions, and ask questions.
   http://shapingoutcomes.wikidot.com/

2. **Shaping Outcomes Tutorial**
   http://www.shapingoutcomes.org/course

3. **Logic model worksheet**
   http://www.shapingoutcomes.org/course/model/model.doc

[See APPENDICES for a 'Welcome' handout with the information above to pass along to session participants.]

Technology and Computing Checklist

1. <u>Internet connection</u>:
    We recommend that you have a high-speed or broadband or Ethernet connection to the Web (<u>not dial-up</u>)

2. <u>Web browser software</u>
    We recommend later versions of any one of these:

    Internet Explorer
    http://www.microsoft.com/windows/ie/
    [Click on 'Downloads']
    Firefox
    http://www.mozilla.com/firefox/
    [Click on 'Download Firefox']
    Netscape
    http://browser.netscape.com/ns8/
    [Click on 'Free Download']

3. <u>Adobe Acrobat</u> for reading PDF files.

    Download free-of-charge from:
    http://www.Adobe.com/products/acrobat/readstep2.html
    [Click on the **red** 'Download' button]

Be sure that your mouse, printer, and other equipment are in good working order. Update old software or old operating systems so that you can make the best and fastest use of the Web.

Using these computer settings will make your *Shaping Outcomes* experience more enjoyable:

Operating System	Windows XP or newer; Mac OSX or newer
Screen Display / Monitor Resolution *	1024x768 optimal; 800x600 acceptable
Color *	16-bit (thousands) color or higher bit depth
JavaScript *	Set to enable
Pop-ups *	Set to allow
Cookies	Set to enable

[*Additional *Technology Troubleshooting* tips, hints, and instructions are available at the *Shaping Outcomes Orientation*:
http://www.shapingoutcomes.org/course/orientation/#5]

URLs for Course Resources

Shaping Outcomes **Course Starting Page**	**http://www.shapingoutcomes.org/course**
Course Orientation	http://www.shapingoutcomes.org/course/orientation
Shaping Outcomes Technical Requirements and Help	http://www.shapingoutcomes.org/course/orientation/#5
Wiki site	http://shapingoutcomes.wikidot.com/
About *Shaping Outcomes*	http://www.shapingoutcomes.org/ OR send e-mail to outcomes@iupui.edu

B. The Logic Model

What is the Point of a Logic Model? Is it Necessary?

A logic model is a step-by-step approach for defining and measuring outcomes. It is your program's *evaluation plan,* and is useful for project implementation as well. A logic model deals with the 'who, what, when, where, why, and how' of your program, showing how you will measure outcomes, what information you need to collect, who or what you will collect information about, when you will get the information, and what targets you have chosen for the outcomes.

Yes, a logic model is essential to the success of your institution's implementation of outcomes-based evaluation. Without this, outcomes-based evaluation will not become a reality for your institution.

Logic Models in OBPE

OBPE uses logic models to show a program or project in a visual, graphical way. As part of the program **planning** process, participants build a logic model that represents their program.

Later, when planners begin **implementing** their programs, the logic models stand as working documents to help them run their programs.

As a visual representation of a program, logic models are designed to ***show*** how a program is supposed to work, how its components fit together, and the underlying rationale of the program.
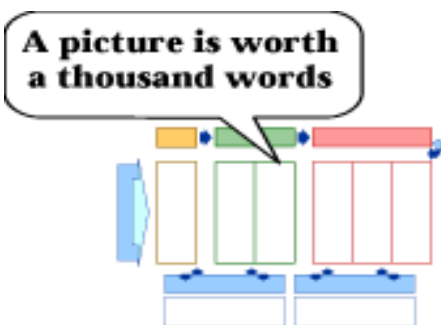
Logic models are an integral part of the *Shaping Outcomes* tutorial and OBPE process.

Logic models show the relationship among program resources, activities, outcomes, and outputs.

Taylor-Powell, E., Jones, L., & Henert, E. (2002) *Enhancing Program Performance with Logic Models.* Retrieved July 10, 2006, from the University of Wisconsin-Extension Website: http://www1.uwex.edu/ces/lmcourse/

A logic model represents a program in a visual or linear way:

Logic Model

FOR WHOM?	WHAT WE DO	OUTCOMES

FOR WHOM?

Target Audience

Needs

WHAT WE DO

OUTCOMES
Short • Medium Term • Long Term

EVALUATION

SITUATION

Mission

Stakeholders

Inputs

Staff

Time

Money

Volunteers

Equipment

Activities

Develop Products

Resources

Services

Deliver Info

Train

Conduct Meetings

Outputs

Short-Term

Knowledge
Skills
Attitudes
Aspirations

Report

Medium Term

Behavior
Action
Decision Making

Long Term

Status
Condition
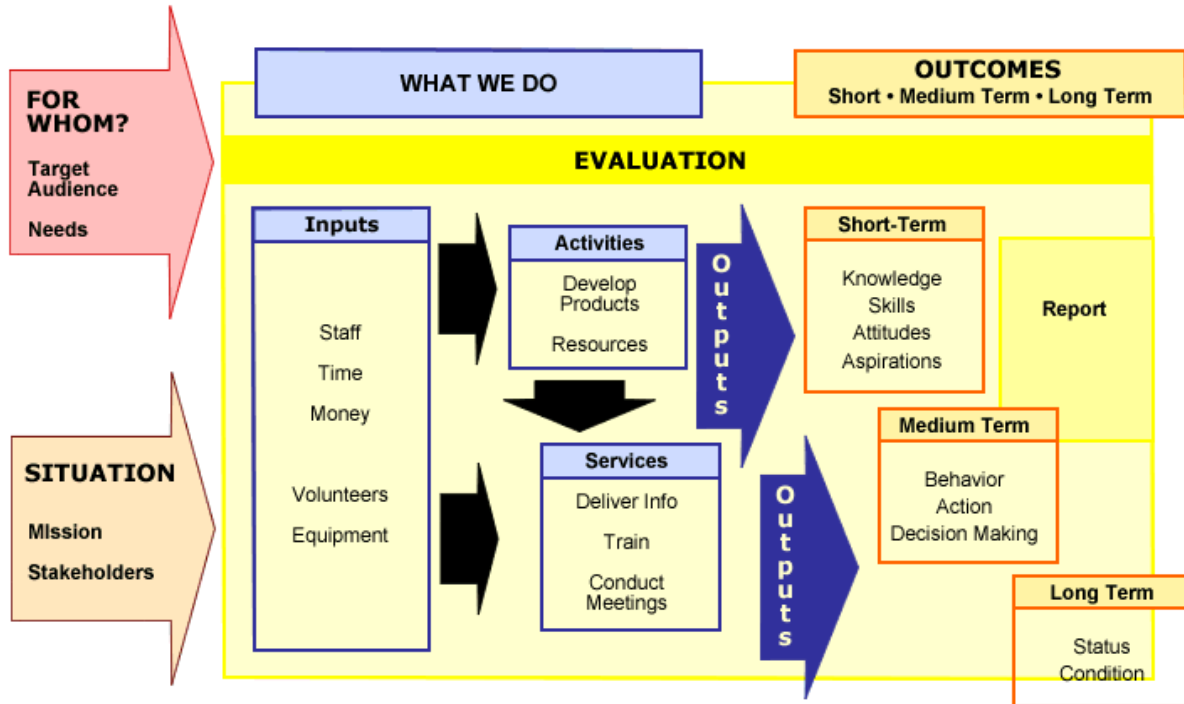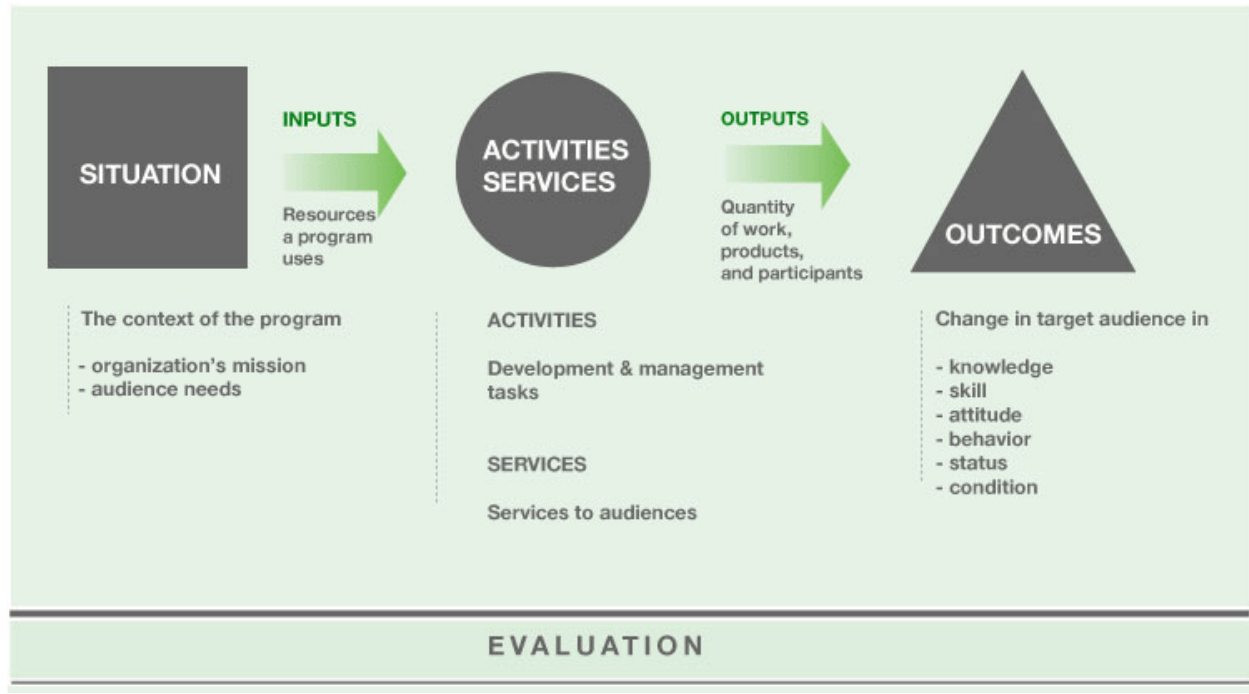
Logic Models are the Core of Program Planning, Management, Evaluation and Reporting

Logic Models improve **Planning:**

> Logic Models are useful for broad-scale planning, as well as for specific program design.

> A logic model acts as a framework for the planning process, helping users understand where they are and where they want to be.

> The structure provided by a logic model requires users to focus on what is their current situation, needs for their proposed initiative/program, what results or end-state is desired, what investments are required, and how these investments are linked to activities for the targeted population and stakeholders.

Logic Models improve **Program Management:**

> A logic model acts as a snapshot of the program, as well as a tool for implementing and managing the program.

> A logic model shows the relationships between resources, activities, and outcomes, acting as a basis for developing a program management plan.

As a program is implemented, its logic model is used to explain, track, and monitor the program's operations, activities, processes, and functions.

Logic Models improve **Evaluation:**

Evaluation is the process of testing and verifying whether the program ideas and plans have panned out, telling you whether the program has successfully reached its intended goals and objectives (outcomes).

Logic models help us focus on appropriate processes and outcomes measures. Beginning a logic model early in planning helps with evaluation as well, allowing users to determine when to evaluate and what to evaluate. This early consideration of evaluation helps the overall evaluation process run smoothly and effectively.[1]

[1-4] *Logic Models.* Retrieved July 10, 2006, from the University of Wisconsin-Extension Website: http://www1.uwex.edu/ces/lmcourse/

Logic Models facilitate **Communication:**

Communication and reporting are vital to program success and sustainability. A simple, clear graphic representation -- logic model -- helps communicate about your program or initiative, whether it is with program staff, those funding the programs, or other key stakeholders.

Logic models can be fairly simple or complex, mirroring the simplicity or complexity of the program they represent. Logic models can also take on a variety of 'looks', often looking like a table with columns and rows, for example.

Logic Model Elements and Structure

Outcome	Indicator	Data source	Applied to	Data interval	Target (Goal)
Definitions: Intended Impact	Observable and measurable behaviors and conditions. Always stated as # and % of participating…	Sources of information about conditions being measured	The specific group within an audience to be measured (all or a subset)	When data will be collected (e.g., at end of course; at end of second week; three month follow-up etc.)	The amount of impact desired (e.g., 85% of 120 total participants

Logic Models Answer These Key Questions

Key Questions Answered By Logic Models	Excellent logic model	Strong logic model	Acceptable logic model
Program suitable for OBPE? Is it discrete; with a beginning and an end? Does it impact on a specific audience?	x	x	x
Library or museum: Is the program suitable for a library or museum as key stakeholder?	x	x	x
Mission: Is the program suitable to the organization's mission?	x	x	
Inputs: Are the required inputs sufficient and realistic to accomplish what is proposed?	x	x	
Activities: Do the activities achieve the services needed?	x	x	
Services: Are proposed services realistic based on program staff and budget? Can the services produce the indicators of success?	x	x	
Outcomes: Do the outcomes identify changes in the target audience's skills, behavior, attitudes, knowledge, status, or condition?	x	x	x
Indicators: Are indicators measurable at or after the end of the program and not too big a stretch from the outcomes? Are the indicators realistic based on the program staff and budget?	x	x	
Data Sources: Are the sources of evaluative information and data gathering appropriate for indicators and outcomes?	x	x	
Targets: Are the targets realistic? Do they show evidence of being based on something besides pure conjecture?	x		

The Logic Model Worksheet

The logic model worksheet is a word document (.doc) that contains the structure for a logic model into which participants enter the information for their projects. Participants download the worksheet onto their own computers, and then use it to build their program models.

The logic model worksheet makes building a logic model easy by creating the graphical layout for the program.

The worksheet is linked from the S.O. tutorial on the Web at:
 http://www.shapingoutcomes.org/course/model/model.doc

When participants build their logic models, they should ask these questions to be sure they're on the right track:

1. <u>What do we do</u>?
   Activities and services (in the vocabulary that shows up on the Build module)

2. <u>For whom</u>?
   Is the target audience too broad? Not specific enough? Can the group be sampled? Or a target audience (group of participants) identified?

3. <u>With what outcomes</u>?
   Focus program outcomes based on how it will impact on its participants. Describe the program based on how it will affect its target audience.

   [Instructors: Helpful handouts to pass along to session participants are located in APPENDICES. There you will also find scoring sheets to help <u>evaluate logic models</u>.]

C. Characteristics of OBPE Programs

Program Ideas

Some *Shaping Outcomes* (S.O.) participants will come to your session with a program ready. Some will have been required by the IMLS to attend a S.O. session, and will already have a funded grant project in-mind.

Other participants may not have a specific project yet. They should be instructed to come to you early-on for program approval.

[See APPENDICES for handouts that you can pass along to participants:
'Learning from Example: Where to Find Program Ideas',
'Characteristics of Programs with Achievable and Measurable Outcomes' and
'Tips: Choosing a Program to Show Outcomes']

Participants begin with an idea -- a program or project that their organization may consider implementing.

Programs that are appropriate for *Shaping Outcomes* should have several characteristics which instructors should communicate to course participants.

- The program should be discrete, meaning that it has to have a logical beginning and a logical end.

- The program should be special, in that it is unique and not already part of the ordinary business of the participant's organization.

- The program should be audience-oriented, meaning that it has to make a difference or have an impact for some persons, somewhere.

The details below about OBPE programs will help instructors/facilitators guide participants in developing their logic models.

What Makes a Good OBPE Program?

Here are several characteristics of good programs. Instructors can pass these details along to their session participants

[See Characteristics of Programs with Achievable and Measurable Outcomes' in APPENDICES to pass along to participants.]

1. **The program is designed to address a demonstrated, clearly defined, concrete local need:**

Examples:
- Many museum directors lack skills they need to develop new funding sources.
- Many children lose reading skills during summer months.
- Many students score below "basic" competency on standardized reading tests.
- Many seniors need special accommodations to support their access to museums.

2. **The program includes repeated, sustained, and/or intensive interactions between a user or participant and program services:**

Basic functions (e.g. database licenses, cooperative catalogs, ILL, document delivery, exhibits, collections management, etc.) are the foundation of library and museum services, but they normally produce small, hard-to-show changes in skill, knowledge, behavior, status, or condition. A 1-hour tour of a historic house is less likely to increase knowledge of 19th century artifacts than a workshop that shows participants how to analyze an old object for period and authenticity.

3. **The program is designed to accommodate the preferences of one or more accurately characterized target audiences:**

Moms in suburban Boston, retired seniors in Arizona, and biologists may all benefit from a Web site designed to identify regional plant populations and growing habits, but people in these different groups are unlikely to respond to the same user interface or Web design. Personal goals, learning style, language skills, culture, education level, gender, economic resources and convenience are among the many characteristics that differ from audience to audience.

4. **The program has concrete, short- or medium-term outcomes:**

"Increasing first-time voters" is a concrete goal that could support democracy. Helping school media center staff strengthen their skills for finding age-appropriate online campaign information, teaching students to interpret such information, and supporting

classroom teachers with online resources for discussing the political process can support lifelong learning at all three levels: media center staff, students, and teachers.

5. Program outcomes are clearly related to program services:

A program of book recommendations; film, TV, and lectures; and voter registration services during the run up to an election might logically increase the number of first-time voter registrations or voting in the example above. An exhibit of political memorabilia might increase interest in the political process. A program of workshops and technical assistance from library experts to school media specialists could enable them to use search engines efficiently, create Web pages to support classroom teaching, and articulate the principles of information literacy for students at different levels.

6. The program is designed with input from its target audience(s):

Find ways to gather feedback and ask participants or users about their goals and preferences; address a select few audience wants or needs that are significant and feasible.

7. The program follows a concrete plan to assess one or more examples of attitude, knowledge, behavior, or skill to represent its most significant outcome goals:

Devise a concrete plan for data and information gathering and analysis.

Tips: Choosing a Program to Show Outcomes

- **Choose a program whose impact you want to know and be able to report**. Any LSTA-funded program that supports your State's Five-Year Plan and meets the criteria below is potentially appropriate.

- **Choose a program with a concrete, clearly-defined audience**. "Parents of newborns in Appalachacola County," "fifth-grade teachers and students in the Calamahari School District," or "migrant workers with low literacy skills in Monterey, Dakota" are all examples of clearly-defined audiences for which outcome measurement is possible. "All citizens of the State" are nearly impossible to evaluate (or to reach).

- **Choose a program that intends to *create* outcomes -- knowledge, skills, attitudes, or behaviors for participants.** For example, *Born to Read* programs hope to create a behavior--frequent reading to young children, and a knowledge-- early reading experiences support child development and later academic success. Don't choose a program that will simply provide each library in the State with hardware, information content, or other materials resource. (For our purposes, "access" is a good thing, but **not** an outcome.)

- **Choose a program that is designed to provide several contacts with each participant over time**, as in a staff technology training program or a literacy program. An institutional infrastructure program (e.g. computer purchases) or a state-wide electronic database or ILL program is not normally a good candidate for OBPE.

What are the Differences Between Out*comes* and Out<u>puts</u>?

Out*comes* are different from **Out<u>puts</u>**.

Out*comes* are:

Out*comes* are always for the participants of the program, not the institution building the program.

Out*comes* must be measurable and observable, with indicators that are valid for the outcomes.

Out*comes* must clearly involve changes in the target audience members' knowledge, skills, attitudes, behaviors, status, or life conditions. Make sure the outcomes represent a CHANGE in the participants, not just the completion of program activities.

Out*comes* are the "people" or the "so what" piece – what happened *because* of the outputs.

Out<u>puts</u> are:

Out<u>puts</u> are measures of the volume of a program's activity: products created or delivered, #s of people served, #s and types of activities and #s and types of services carried out. Think of outputs as the "things" piece of evaluation.

Out<u>puts</u> are almost always numbers: the number of loans, the number of ILLs, the number of attendees, the number of publications, the number of grants made, or the number of times a workshop was presented.

Sample Out*comes*	Sample Out<u>puts</u>
• Museum staff will know the key elements of successful education programs • Customers will report high satisfaction with reference service	• 42 staff members will complete training • 37 museums will participate in education training • 4 workshops will be held • participants will receive 3 CEUs

Frequently Asked Questions (FAQs) About OBPE Programs

How many outcomes should a program have?

A program needs to have at least one outcome; however, programs are likely to have more than one outcome. Keep in mind that each outcome should measure one thing, so multiple outcomes are common.

It is important to consider what the purpose of the program is and the ways you would expect participants to benefit from your program. These benefits will likely be the outcomes for your program, but you need not measure everything. You may want to prioritize this list and determine what you and your program's stakeholders would really need to know about the program's impact.

What is a logic model and is it necessary?

A logic model is a step-by-step approach for defining and measuring outcomes. It is your program's *evaluation plan.* It shows how you will measure outcomes, what information you need to collect, who you will collect information about, when you will get the information and what targets you have chosen for the outcomes.

Yes, a logic model is essential to the success of your institution's implementation of outcome-based evaluation. Without this, outcomes-based evaluation will not become a reality for your institution.

Logic Model Elements and Structure

Outcome	Indicator	Data source	Applied to	Data interval	Target (Goal)
Definitions: Intended Impact	Observable and measurable behaviors and conditions. Always stated as # and % of participating…	Sources of information about conditions being measured	The specific group within an audience to be measured (all or a subset)	When data will be collected (e.g., at end of workshop; at end of second week; three month follow-up etc.)	The amount of impact desired (e.g., 85% of 120 total participants

How complicated is outcomes-based evaluation?

Once the concepts are understood and you have successfully implemented it a few times, it is a very simple process to understand and manage. The key to success is commitment of the institution and the clear identification of roles in managing OBPE.

How much time will it take?

It isn't possible to prescribe a time for all programs. It does take a commitment of time and resources to get it done. The majority of time comes at the front end, particularly as you first begin to implement outcome-based evaluation in your institution. In compensation, once incorporated, OBPE can save significant time in planning and management by allowing you to get at the right questions, and answers, early on in the program planning process.

Aren't some things difficult to measure?

Some things will seem more difficult to measure (evaluate) than others, and not all things programs accomplish need be measured. It is often more straightforward to measure "hard" impact, such as knowledge, behavior, and skills than it is to measure "soft" impact such as attitudes. Measuring attitude changes or other "soft" impacts is not actually more difficult, but it may require more creativity. Regardless, clarifying the relationship between an outcome and measurable and observable "indicators" will be key to success.

How will I know if my outcomes are good enough?

Outcomes are effective if they 1) are closely associated with the purpose of a program and describe what an organization wants to make happen for people, 2) are realistic and within the scope of what the program can affect and 3) have indicators that allow them to be measured.

How do I report outcomes-based evaluation information?

Consider what your program's stakeholders want to know about the results of your program when developing reports from outcome-based evaluation data. The institution's Board, its community, and funders may want similar information, but this does not mean that one report will satisfy everyone. In general, consider the following as desirable information for reports:

Needs identified	Outputs (what we produced)
• Inputs (what we used) • Activities and services (what we did) • Audience (characteristics and participation)	• Outcomes (what impact we achieved and how we know) and • Interpretation (what it all means, why it matters)

What can outcomes-based evaluation do for my institution?

Employing outcome-based evaluation and reporting on the impact of the program can have many positive benefits for an organization:

- First, it can help institutions tell their story in ways their stakeholders and the general public can understand and appreciate. It helps institutions convey important information about the collective impact on their program participants, while maintaining the ability to convey the very powerful and personal stories that show how important the program was to specific individuals.

- Second, it can help better position institutions to request and receive funding because they can describe the intended benefits and impact of a proposed program in very specific terms by identifying what the program will do for participants. This is particularly important given that more and more funders expect programs to identify what they hope to achieve as a result of funding.

- Third, when OBPE becomes part of an organization's management routine, its programs can be improved as a result. Program goals are well planned and established, and these goals are regularly reviewed. Stakeholders are informed about the impact of funded programs. In turn, outcome-based evaluation will helps an organization's program staff better communicate the benefits they intend to deliver to program participants – it can aid recruitment and marketing.

D. Benefits of Practicing OBPE

Shaping Outcomes follows a user-centered approach to program planning -- focusing on building and measuring program success based on its **impact on its audience**.

When outcomes-based planning and evaluation (*OBPE*) becomes part of an organization's management routine, programs are improved as a result! Program goals are well planned and established, and regularly reviewed. Stakeholders are informed about the impact and outcomes of funded programs.

OBPE helps an organization's staff better communicate the benefits they intend to deliver to program participants, aiding in recruitment and marketing.

Practicing OBPE means that you plan and manage a program with outcomes in-mind: Building a program by thinking **first** about what the program will **achieve** with its audience, then planning specifically FOR those achievements.

Outcomes-based planning and evaluation are useful for programs with multiple moving parts, because OBPE is a planning process that makes program implementation more direct and clear. Using this method can save significant time in planning and management by allowing you to get at the right questions and answers, early-on in the planning process.

OBPE helps you design programs that focus on recognizable goals and products, services or impact.

Benefits to Course Participants

Shaping Outcomes is designed for librarians and library directors, museum studies professionals, evaluators, grant writers, educators, exhibit developers, faculty and students, library and museum staff members, and all other professionals interested in increasing and measuring the value of their organization's services and resources within their communities.

The tutorial course is available for a reasonable fee to library or museum professionals and staff who want to learn to use OBPE. Incorporating outcomes-based planning and evaluation into your routine will result in streamlined, better programs and grant projects.

Participants Learn Skills to Improve Job Performance

OBPE focuses on the recognizable goals of a program, establishing activities that will result in measurable changes in participants.
Participants learn about outcomes-based design and receive very practical training in planning, building, evaluating, and reporting **outcomes**: vital skills for professionals who want to increase their expertise in grant management, program evaluation, and long-range planning.

Shaping Outcomes participants come away from the experience with improved skills, and increased awareness of OBPE methods and the value of outcomes-based programming. We find that after a person has been immersed in OPBE once or twice, they adopt it into their routines, improving their work.

Participants Benefit!

- Earning CE or CEU credits

- Adding credibility to your resume

- Strengthening grant applications – **OBPE is used by many grant funders**

- Applying OBPE to your own work for better management and productivity

- Learning more about IMLS and other funding agencies

Benefits for Instructors/Facilitators

Library or museum professionals can be certified to lead/facilitate/instruct *Shaping Outcomes* courses.

In addition, *Shaping Outcomes* is a terrific tool for university instructors to include in their own courses. Instructors can run the complete online course, or **pick and choose** from among the five Modules or content areas to create a **specialized training** opportunity for students.

Instructors / Facilitators Benefit!

- Build your resume with valuable teaching experience
- Earn CE or CEU credits
- Get certified to lead OBPE courses!
- Participate actively in professional activities with IMLS and your students
- Use OBPE tool or method in your own courses
- Apply OBPE to grant writing (**required by many funding agencies**)
- Apply OBPE to program planning, management and administration

E. How is the *Shaping Outcomes* Tutorial Organized?

To Do Before Beginning the Tutorial

> **To Do Before Beginning** *Shaping Outcomes***:**
>
> **1.** Be sure that your computer and Internet access are configured properly. Use the **'Technical Services Checklist'** for details:
>
> **2.** Complete the Shaping Outcomes **Tutorial Orientation** located on the Web at: http://www.shapingoutcomes.org/course/orientation/index.htm
> The Tutorial Orientation includes information about terminology, how to work through the Shaping *Outcomes* course, and more.

The Five Learning Modules

The Shaping Outcomes tutorial is organized into five learning modules:
http://www.shapingoutcomes.org/course

Module A:	Overview
Module B:	Plan
Module C:	Build
Module D:	Evaluate
Module E:	Report

Tutorial **Modules A - E** walk users through the process of designing, planning, building, evaluating, and reporting on a program.

Participants complete each module: working through simulations, creating logic models to represent their program plans, and evaluating their own understanding and learning.

Modules A - E each include an:

1) Introduction

2) Content materials including examples for libraries OR museum settings, and

3) "Check" and "apply" your understanding sections.

The S.O. tutorial was created as part of an IMLS grant, and is actively evaluated. Both participants and instructors may be asked to respond to a self-quiz, or tutorial and course evaluation surveys.

The modules answer these questions, using logic models to organize the program plan:

Module A: Overview

- **"What is OBPE?"**
- **"Why and how can OBPE help me and my organization?"**

Module B: Plan

- **"How can I frame a program, understand audience needs, work with stakeholders and partners?"**
- **"How do I answer the questions: What do we do? For whom? For what benefit?"**

Module C: Build

- **"How do I build a plan of action for reaching desired outcomes? (i.e., What activities need to be carried out within the organization?)**
- **"What services need to be delivered to participants?"**
- **"What input of resources is needed?"**

Module D: Evaluate

- **"How can I measure the results of the program?"**

Module E: Report

- **"How can I report on my program?"**
- **"How do I set up data records at the beginning?"**
- **"How will I report activities?"**
- **"How can I use my program for further collaboration and funding?"**

Key to Tutorial Symbols and Tabs

Each Module page is divided into four areas. These are labeled as #1 - #4 on the sample screen below:

1. Module Tabs

2. Orientation Sidebar

3. Content Area

4. Navigation Bar
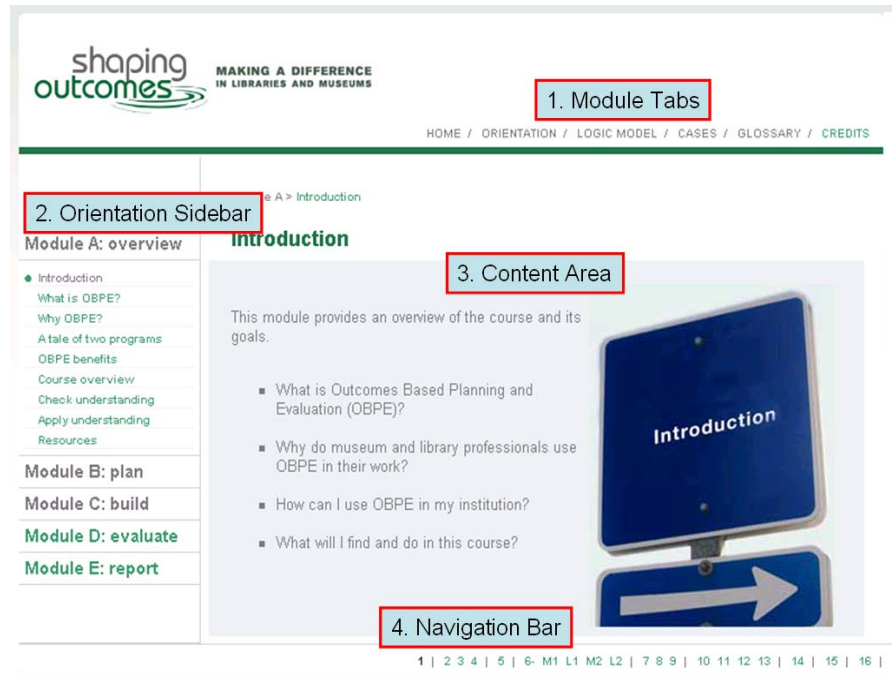
Their uses are described here:

1. Module Tabs

The green Module Tabs across the top of each page provide links to Home, Orientation, Logic Model, Cases, Glossary, and Credits.

Home
Click on **Home** to go to the introductory screen of the tutorial.

Orientation
Click on **Orientation** to view the *Tutorial Orientation*

Logic Model
Click on **Logic Model** tab to view a sample logic model graphic and to download a blank textual Logic Model form.

Cases
Click on the **Cases** tab to view all of the simulations or case studies that are currently available for the tutorial (PDF format).
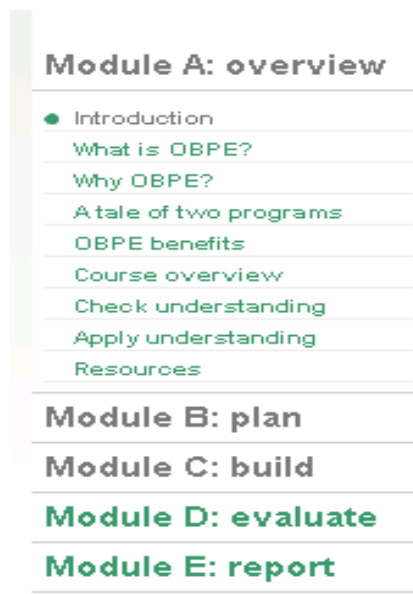
Glossary
Click on the **Glossary** tab to go to a dictionary of key terms.

Credit
Click on the **Credit** tab to view information about the tutorial's creators and contacts.

2. Orientation Sidebar

The Orientation Sidebar on the left helps you identify where you are in the modules.

Module A: overview
- Introduction
- What is OBPE?
- Why OBPE?
- A tale of two programs
- OBPE benefits
- Course overview
- Check understanding
- Apply understanding
- Resources

Module B: plan

Module C: build

Module D: evaluate

Module E: report

Module A > Introduction

3. Content Area

The main body of the module is called the Content Area and contains interactive learning materials.

Introduction

This module provides an overview of the course and its goals.

- What is Outcomes Based Planning and Evaluation (OBPE)?
- Why do museum and library professionals use OBPE in their work?
- How can I use OBPE in my institution?
- What will I find and do in this course?

Introduction

4. Navigation Bars

At the **top** of each screen, a navigation bar shows the module that you are currently using; and the page within the module that is currently being viewed. A 'next' button takes users to the next screen.

Module C Inputs (6) NEXT

The numbered Navigation ruler across the **bottom** of the Content Area directs users to additional pages and resources related to the module.

The Navigation Bar shows the number of pages in the Module, including Museum examples (M) and Library examples (L).

Users can **click on the letter or letter-number to move sequentially** through the tutorial:

1 | 2 3 4 | 5 | 6- M1 L1 M2 L2 | 7 8 9 | 10 11 12 13 | 14 | 15 | 16 |
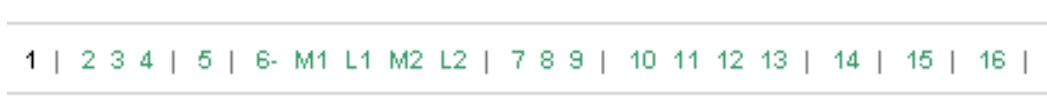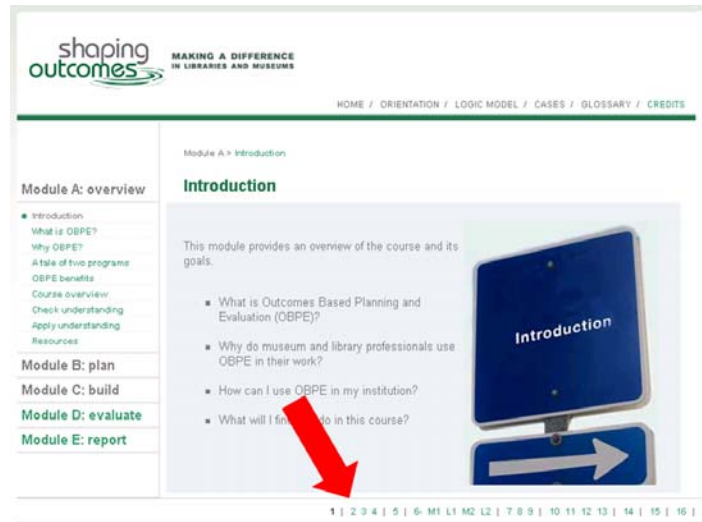
Each page contains a descriptive heading introducing the topic of the page. Next, new concepts are explained and relevant examples are displayed.

Many pages contain an active-participation element asking users to think and take action. Instructions for these activities are found in *italics* in the tutorial.

Generally, users are asked to either *click on* or *move their cursor over* text or a graphic to display the corresponding text.

Tutorial Learning Aids

These 'learning aids' and tools are located throughout the tutorial, some on the menu bar: Orientation, Glossary, Cases, Dig Deeper, Coach. These are described in the below:

Orientation	***Describes how to use the tutorial software and provides technical assistance and troubleshooting instructions.*** ***http://www.shapingoutcomes.org/course/orientation/index.htm***
Cases	Examples of library and museum programs with context, profiles of stakeholders and a multi-page, detailed, text-based Logic Model like the one required of participants. Hint: A good place to check for additional information on cases mentioned in the instruction. http://www.shapingoutcomes.org/course/cases/index.htm
Glossary	Dictionary of all terms used in the tutorial. http://www.shapingoutcomes.org/course/glossary/index.htm

Other Tutorial Tools and Navigation Symbols

These navigation symbols and tools are scattered throughout the tutorial, usually appearing toward the bottom of select content pages:

Instructors can opt to use the COACH, DIG DEEPER, or the "Check Your Understanding" and "Apply Your Understanding" options to generate conversation in wiki discussion forums.

Using these tools for exploration and reporting in a discussion forum are community-building activities that will engage participants more deeply with content and with one another.
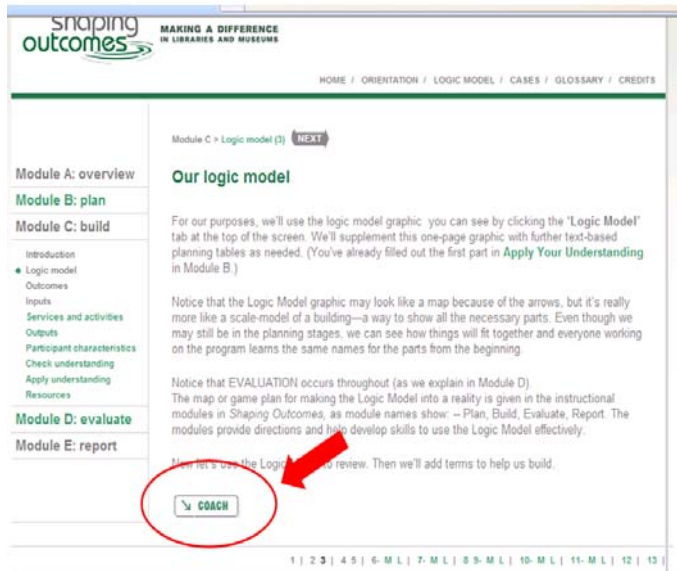
Coach Click on the **Coach** button to pop-up a special help window that provides background information, definitions, motivation, reality checks, suggested approaches, and other types of guidance.	↘ COACH
Dig Deeper Click on the **Dig Deeper** button to pop-up a special window that increases depth of understanding through additional examples, expanded descriptions, or advanced content.	✔ DIG DEEPER
Museum Example Click on **Museum Example** to see a detailed scenario or case study from a museum setting. All of the museum examples are available in PDF format.	MUSEUM example

Library Example *Click on* **Library Example** *to see a detailed scenario or case study from a library setting.* *All of the library examples are available in PDF format.*	LIBRARY example

[See the *Tutorial Orientation* for more details about how the tutorial is structured: http://www.shapingoutcomes.org/course/orientation/index.htm]

How Participants Use the Tutorial

1. **Participants work through the learning Modules A - E** -- reading all of the interactive tutorial screens, and working through the "library" or "museum" examples.

   Instructors should inform students that EITHER "library" OR "museum" examples should be used, but not both.

   Each of the Modules A - E will take approximately one to two hours to complete.

2. **Participants create a logic model**

   Beginning with Module B, students create a logic model using the logic model worksheet in Shaping Outcomes:

   http://www.shapingoutcomes.org/course/model/model.doc

   The logic model worksheet is located on this menu on any screen of the S.O. tutorial:

   HOME / ORIENTATION / LOGIC MODEL / CASES / GLOSSARY / CREDITS

3. **Participants submit Logic Models for instructor feedback**.

   At various times throughout the course, instructors can give feedback on participants' logic models.

   [Logic model scoring rubrics are in APPENDICES.]

   Each course session will have a corresponding wiki forum site. The wiki site will include "logic model discussion forums" in which participants can upload their draft logic models for instructors to review.

4. **(As time permits):**

   Use the Coach, Dig Deeper, "Check Your Understanding" or other tutorial resources to supplement learning.

   Participants can complete the scenarios, exercises, or assignments for each module, posting their completed assignments in the wiki and participating in any related discussion forums.

   These exercises help participants apply their understanding of specific aspects of OBPE, and can be tailored to specific organizations and situations.

F. Overview of Tutorial Modules A - E

Introduction to Module A: Overview

Do These Activities to Get Ready to Begin Module A

Before beginning Module A, instructors and students should be sure that their computers can access all course-related software or Websites, and that their computer(s) comply with technical requirements.

[See 'Technology and Computer Requirements' in APPENDICES.]

Complete the *Tutorial Orientation* before beginning Module A:
http://www.shapingoutcomes.org/course/orientation/index.htm

When	Activity/Tool	Where / URL/ Access
Preparation before beginning tutorial: Familiarize yourself with the tutorial and be sure that technical requirements are met.	Tutorial Orientation	http://shapingoutcomes/org/course/ orientation/index.htm
	Technical Requirements	Resources section of the Instructor's Manual. This information is posted on the wiki.
	Users' requirements checklist	Resources section of the Instructor's Manual. This information is posted on the wiki.
	Instructors should be sure that all materials, content, and instructions are available on the wiki.	Wiki http://shapingoutcomes.wikidot.com/

Module A Content

- Module A provides an **introduction to the tutorial**, and an explanation and description of OBPE and its goals and benefits.

- Module A gives **examples** of how OBPE is used in library and museum settings, and provides **scenarios** describing how OBPE is applied to specific programs, answering the question:

    "Why and how can OBPE help me and my organization?"

- Module A presents the first real-life scenario, "A Tale of Two Programs", which includes one version for museum professionals and another for library professionals. **Participants should complete EITHER the museum OR the library scenario, but not both.**

    Depending on the length of your session, you can integrate a variety of activities and assignments around the scenarios, and "Apply" and "Check" your understanding cases, Coach and Dig Deeper options, etc.

Activities for Module A

- Both instructors and students should post their ***personal profiles*** in the wiki and take time early-on to read one another's profiles. Knowing a little something about other course members helps forge bonds between participants and create a real community of learning.

- In addition, at the beginning of Module A, students should send their program ideas to the instructor for review (if they don't already have a funded program from the IMLS), with the instructor providing prompt feedback so that participants can tweak their programs appropriately before getting too far into the tutorial.

- Depending on how much time is devoting to your *Shaping Outcomes* session, the instructor can elect to do a variety of supplemental activities in order to engage participants more actively or deeply in the tutorial.

    Module A includes with the "Check Your Understanding" exercise and an "Apply Your Understanding" assignment. These require participants to put into use the concepts introduced so far.

- Using the DISCUSSION FORUMS in the wiki for a communications site, instructors can encourage participants to share their ideas; get feedback from one another regarding their understanding of the first scenario; or discuss their experiences using the "Check Your Understanding" exercises or "Apply Your Understanding" assignments; or other relevant topics.

Module A Activities Timeline

This timeline includes **potential activities** that instructors can pick and choose from, based on the time and nature of your *Shaping Outcomes* course:

Module A	
Primary Activities	**Location**
Complete Module A	http://www.shapingoutcomes.org/course
Community-building option: Instructors and students post personal profiles in the wiki; read each other's profile; connect with in-class colleagues	http://shapingoutcomes.wikidot.com/forum:start
Other activities to consider as time permits:	
Community-building optional activities: Use content in "Coach" or "Dig Deeper" tabs (in Module A) to generate discussion among class members, allowing them to continue sharing ideas and comments. Talk about the Module A "Check Your Understanding" or "Apply Your Understanding" case assignments.	Instructors can easily add new discussion forums where students can post and discuss assignments.
Optional Assignments: Complete the Module A "Check Your Understanding" case. Complete Module A "Apply Your Understanding" case. Post your findings and comments in the wiki.	Instructors can easily add new discussion forums where students can post and discuss assignments.

Introduction to Module B: Plan

Do These Activities to Get Ready to Begin Module B

Before beginning Module B, all participants can download the logic model worksheet.
http://www.shapingoutcomes.org/course/model/model.doc

It's always available from the tutorial's navigation bar:

HOME / ORIENTATION / LOGIC MODEL / CASES / GLOSSARY / CREDITS

Module B Content

This module teaches users to understand and apply the OBPE process through assessing program audience needs; analyzing goals, motivations and resources of stakeholders; and shaping the program's purpose to achieve desired outcomes.

<u>Module B addresses these issues</u>:

"How can I frame a program, understand audience needs, and work with stakeholders and partners?"

What do we do? For whom? For what benefit?"

What do we do?
Activities and services

For whom?
Is the target audience too broad? Not specific enough? Can the group be sampled? Or a group of participants identified?

With what outcomes?
Focus program outcomes based on how it will impact on its participants. Describe the program based on how it will affect its participants.

Activities for Module B

By the end of Module B, users should be comfortable with the tutorial and the wiki program. They will know how to plan a program, identifying 'what', 'for whom', and 'for what benefit or outcome'.

Depending on how much time is devoting to your *Shaping Outcomes* course, the instructor can elect to do a variety of supplemental activities in order to engage participants more actively or deeply in the tutorial. Below are some activities to consider:

- Module B includes six scenarios in which important content and decisions are stressed.

- "Check Your Understanding" exercises that introduce the *Children's Museum of Indianapolis* (museum) scenario and the *Whitney Library Information Commons* (library) scenario are introduced. These scenarios are used again later in the tutorial. Through these scenarios and examples, tutorial users can apply their understanding of OBPE.

- Module B's "Apply Your Understanding" assignment option introduces text-based logic models, requiring students to begin a Logic Model for their program idea.

Starting the Logic Model in Module B

Work on logic models begins in Module B. Participants can use the logic model worksheet, which is available in the tutorial at:

http://www.shapingoutcomes.org/course/model/model.doc

[The tutorial also includes sample logic models in each Case Study. Logic model scoring rubrics and tips from a sample logic model are available in APPENDICES.]

During Module B, participants should submit their first attempts at the logic models for instructors to review. These can be submitted to the "Module B Logic Model" forum in the wiki.

Instructors can use the logic model scoring rubrics in the APPENDICES to help assess participants' logic models. It is helpful to participants if instructors respond promptly and use the scoring rubric to provide detailed feedback.

Instructors can also encourage participants to share their logic models, comments, frustrations, or feedback with one another in the "general topic discussion forums".

Module B Activities Timeline

This timeline includes a variety of **potential activities** that instructors can selectively implement based on the time and nature of your *Shaping Outcomes* session:

Module B	
Primary Activities	**Location**
Complete Module B	http://www.shapingoutcomes.org/course
Begin working on your logic model and post for instructor review. Instructors: Remember that you can have due dates for specific chunks of content in the logic models. For example, you can ask students to complete up to "stakeholders."	Wiki Module B Logic Model forum
Community-building activity:	Have participants post brief descriptions of their programs. Each participant can read and reply to others' postings.
Other activities to consider as time permits:	
Community-building optional activities: Students can continue sharing ideas and comments about their projects. Use content in "Coach" or "Dig Deeper" tabs (in Module B) to generate discussion among class members, allowing them to continue sharing ideas and comments. Talk about the Module B "Check Your Understanding" or "Apply Your Understanding" case assignments.	Module B Forum http://shapingoutcomes.wikidot.com/forum:start
Optional Assignments: Complete the Module B "Check Your Understanding" case. Complete Module B "Apply Your Understanding" case. Post your findings and comments in the wiki.	Instructors can easily add new discussion forums where students can post and discuss assignments.

Introduction to Module C: Build

At this point in the course, instructors and participants should know one another better, and can continue their community-building through participation in the weekly discussion forums.

Instructors may consider using the *Shaping Outcomes* tutorial's "Dig Deeper" or "Coach" options, or the "Check Your Understanding" or "Apply Your Understanding" to generate discussion among session participants about important OBPE concepts.

Module C Content

Module C answers the questions:

"How do I build a plan of action for reaching desired outcomes?"

"What activities need to be carried out within the organization?"

"What services need to be delivered to participants?"

"What input of resources is needed?"

"What is an 'output' and how are 'outputs' measured and evaluated?

In Module C, participants learn to state '**outcomes**' through '**indicators**' – or the specific, observed and measurable changes that have occurred as a result of the program.

Shaping Outcomes participants sometimes have difficulty moving into the OBPE mindset. Instructors are encouraged to work closely with participants to help them understand terminology and related concepts.

Activities for Module C

In Module C, participants will build a plan of action for achieving the desired results, goals, and outcomes of their programs. They will identify resources and inputs, activities, and services required for successful program implementation, continuing to work on their logic models.

Instructors should provide prompt and thorough feedback on students' progress, helping them to craft an excellent logic model for program success.

Module C Activities Timeline

This activities timeline includes a variety of **potential activities** that instructors can pick and choose from based on the time and nature of your *Shaping Outcomes* session:

Module C	
Primary Activities	**Location**
Complete Module C	http://www.shapingoutcomes.org/course
Keep working on your logic model and post for instructor review. Instructors: Remember that you can have due dates for specific chunks of content in the logic models.	Wiki Module C Logic Model forum
Other activities to consider as time permits:	
Community-building optional activities: Students can continue sharing ideas and comments about their projects. Use content in "Coach" or "Dig Deeper" tabs (in Module C) to generate discussion among class members, allowing them to continue sharing ideas and comments. Talk about the Module C "Check Your Understanding" or "Apply Your Understanding" case assignments.	Module C Forum http://shapingoutcomes.wikidot.com/forum:start
Optional Assignments: Complete the Module C "Check Your Understanding" case. Complete Module C "Apply Your Understanding" case. Post your findings and comments in the wiki.	Instructors can easily add new discussion forums where students can post and discuss assignments.

Introduction to Module D: Evaluate

Module D Content

Module D focuses on program evaluation, teaching user-related terminology, and steps in identifying both indicators of success and procedures for measuring success.

Module D answers the question:

"How can I measure the results of the program?"

Activities for Module D

- Depending on how much time is devoting to your *Shaping Outcomes* course, the instructor can elect to do a variety of supplemental activities in order to engage participants more actively or deeply in the tutorial:

  Users learn to build evaluation techniques into the planning process via the museum and library sample scenarios.

  In "Apply Your Understanding", students will continue working on their Logic Models to create measurable, unambiguous outcomes and indicators.

  On every screen in *Shaping Outcomes*, users will find a **CASES** tab, which houses all of the sample museum and library cases. A **RESOURCES** tab is also available on every screen on the menu bar, leading users to supplemental, Web tools to help them with their logic models and application of OBPE.

- Continue using the DISCUSSION FORUMS in the wiki to communicate with participants.

- During Module D, participants will probably also submit another draft of their logic models.

  Instructors can have due dates at various times during the course session.

  Instructors can use the logic model scoring rubrics in the APPENDICES to help assess participants' logic models. It is helpful to participants if instructors respond promptly and use the scoring rubric to provide detailed feedback.

Module D Activities Timeline

The timeline includes a variety of **potential activities** that instructors can selectively implement based on the time and nature of your *Shaping Outcomes* session:

Module D	
Primary Activities	**Location**
Complete Module D	http://www.shapingoutcomes.org/course
Begin working on your logic model and post for instructor review.	Wiki Module D Logic Model forum
Other activities to consider as time permits:	
Community-building optional activities: Students can continue sharing ideas and comments about their projects. Use content in "Coach" or "Dig Deeper" tabs (in Module D) to generate discussion among class members, allowing them to continue sharing ideas and comments. Talk about the Module D "Check Your Understanding" or "Apply Your Understanding" case assignments.	Module D Forum http://shapingoutcomes.wikidot.com/forum:start
Optional Assignments: Complete the Module D "Check Your Understanding" case. Complete Module D "Apply Your Understanding" case. Post your findings and comments in the wiki.	Instructors can easily add new discussion forums where students can post and discuss assignments.

Introduction to Module E: Report

Module E Content

By the time they have reached Module E, participants will know how to plan a program (Module B: Plan), build services and activities (Module C: Build), and identify and use measurable outcomes to demonstrate success (Module D: Evaluate).

   In Module E, these questions are answered:

   "How can I report on my program?"

   "How do I set up data records at the beginning?"

   "How will I report outcomes?"

   "How can I use my program for further collaboration and funding?"

Activities for Module E

Participants learn to report on their programs, gather and manage program data and records, report output and outcomes, and publicize or share program reports to stakeholders and interested parties.

The final logic model is generally posted during Module E. Participants can submit their final logic models to the instructor; the instructor can provide prompt feedback; then participants can submit updated versions to share with course colleagues.

Continue using the DISCUSSION FORUMS in the wiki to communicate with participants: http://www.shapingoutcomes.wikidot.com.

Module E Activities Timeline

Potential activities include the following:

Module E	
Primary Activities	**Location**
Complete Module E	http://www.shapingoutcomes.org/course
Complete your logic model and post for instructor review.	Wiki Module E Forum
Post your final logic model for workshop colleagues to review!	Wiki Module E Final Logic Model Forum
Other activities to consider as time permits:	
Community-building optional activities: Students can continue sharing ideas and comments about their projects. Use content in "Coach" or "Dig Deeper" tabs (in Module E) to generate discussion among class members, allowing them to continue sharing ideas and comments. Talk about the Module E "Check Your Understanding" or "Apply Your Understanding" case assignments.	Module E Forum http://shapingoutcomes.wikidot.com/forum:start
Optional Assignments: Complete the Module E "Check Your Understanding" case. Complete Module E "Apply Your Understanding" case. Post your findings and comments in the wiki.	Instructors can easily add new discussion forums where students can post and discuss assignments.

G. Moodle

Moodle is a free-of-charge, open-source, course management software program on the Web. Moodle was used with the *Shaping Outcomes* tutorial as a place where course participants could get to know one another, share ideas, and submit logic models or assignments; however, at this time, we are no longer using the Moodle site. You can learn more about Moodle at http://www.moodle.org