**TIP SHEET** | June 2021

# Keeping the Life in Living Documents

## How to Ensure That Your Logic Model and Fidelity Tools Stay Up to Date

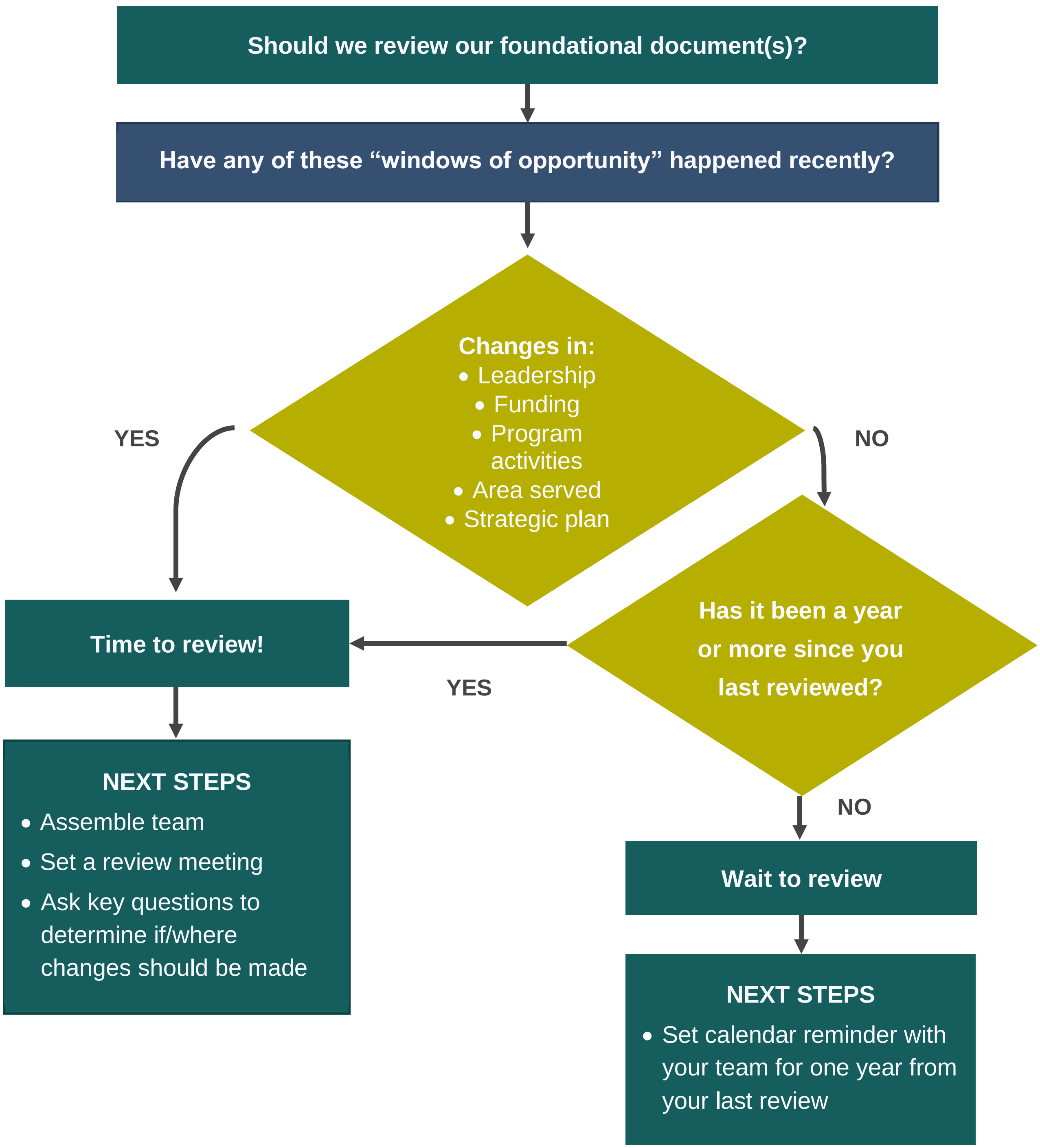
Many organizations and programs have foundational documents that are essential to program operation and evaluation readiness, including logic models and fidelity tools. These documents communicate program goals, activities, and details to internal and external stakeholders in a concise and compelling way. They support training and implementation. They also serve as a guidepost when considering expansion opportunities, engaging in strategic planning, and improving your program in many other ways.

However, foundational documents can lose their usefulness over time if they are not integrated into agency procedures and kept up to date. They should be living documents, not artifacts. They won't do your program or staff any good collecting dust on a shelf and slowly disappearing from memory. So how do you keep the life in these documents? This tip sheet provides guidance on when and how to revisit foundational documents. It will help you work through—

- When to revisit foundational documents
- What questions to ask when reviewing your documents
- What to do once you have completed your review

## Is It Time to Review Your Foundational Documents?

There are several “windows of opportunity” to revisit your foundational documents. This flow chart can help you determine if now is the time to review and help you think about next steps.



## Questions to Ask When Reviewing Your Logic Model

While reviewing your logic model, it will be important to have your theory of change (TOC) on hand. Your TOC is less likely to change over time, but it is possible. When considering changes to your logic model, check for continued alignment with your TOC. Remember a TOC is higher level and may identify impacts (or outcomes) that are longer term than those identified in your logic model. But the longer-term impacts in your TOC should still align with the services and pathways to outcomes identified in your logic model. If potential changes to your logic model don't align with your high-level TOC goals, you might want to reconsider if the change is appropriate.

Gather your executive leadership team, key staff, and stakeholders and consider the following questions, related to each section of your logic model:

### *Target Population*

- Based on your administrative data, are you serving the individuals you identified as your target population?
- Has anything changed about the group of individuals you serve?
- Have you expanded to new areas or schools?
- Have you learned anything new about those you serve? For example, is new census or survey information available specific to the group of individuals you serve?
- Have any changes to your target population created any changes in services?

### *Inputs*

- Have you received any new funding?
- Have you changed anything in your partnerships?
- Have you made any changes to your staffing structure?
- Do any of these changes affect how you provide services?

### *Activities*

- Have you added any new activities?
- Are there any activities that require resources but are not directly related to outcomes?
- Are there any activities that require resources but are not returning sufficient results?

### *Outputs*

- If you've added any services, are there outputs directly related to these services in the logic model?
- If you've ceased any activities, are the corresponding outputs also removed from the logic model?
- Are the quantities and targets of your outputs still accurate?
    - If you set a target that you always hit or always miss, consider revising the target.

### *Short and Long-term Outcomes*

- Can you clearly connect the activities you've identified to these outcomes?
    - If you've added activities, are these expected to result in any new outcomes?
    - If you've removed activities, are any outcomes no longer appropriate?
- Have you learned anything new about how participants achieve outcomes? Are there new steps between program activities and long-term outcomes that should be accounted for in your short-term outcomes?
- Can you clearly draw a pathway from the activities you've identified to the short-term outcomes and then to these long-term outcomes?
- Are you collecting any new data that tell you about these outcomes?

### *External Conditions*

- Have there been any changes to your knowledge or understanding of the historical, political, cultural, and social factors that are beyond the agency's control but influence the capacity of the intervention to achieve the desired outcomes?
- If you've expanded to new communities, is information about their historical, political, cultural, and social factors included in your external conditions?

### *Assumptions*

- Have you recently learned anything new about why your program works?
- Have any of your underlying beliefs changed about why your program is expected to result in desired outcomes?
- Is this reflected in your assumptions?

## Questions to Ask When Reviewing Your Fidelity Tools

When reviewing your fidelity tools, it is helpful to look at each tool and the data you have collected with it at the same time. You may also want to have implementation supports like program or training manuals on hand during your review. In your review process, include program staff who deliver services and administer fidelity tools. These staff have firsthand experience that may help you identify changes to service delivery and develop more effective and efficient tools.

### *Service Delivery*

- Are there fidelity tools for all essential participant engaging activities?
- Have you added, altered, or removed any activities, curricula, or core components?
- Have you made any changes to employee manuals, handbooks, or training?
- Are there any areas where staff are spending time and resources that aren't captured?
- Are any staff activities missing that are key to participant success?

### *Fidelity Data*

- Is there variability in your fidelity data? If staff are regularly achieving high levels of fidelity, are there other activities or skills you could track in your fidelity tools?
- Are there any fields where staff regularly score poorly? Are there sufficient supports to make improvements?
- Are there any fields in your fidelity tools that don't make sense or are regularly left blank?

## What to Do After You've Completed Your Review

Once you have reviewed your foundational documents, it is time to decide which revisions (if any) you need to make. Use answers to the guiding questions to—

### *Create*

- Create new versions of the document(s) that reflect answers to your questions. For example, if you have added a new activity to the services you offer, add the activity to your logic model.
- Use track changes or contrasting font colors to highlight exactly what is new.

### *Consider*

- Consider if the new pieces of information you created have any ripple effects. Gather other documents that might need to be revisited and look at them with changes in mind (e.g., training manuals, fidelity tools, data reports). For example, if a new activity also triggers new outputs and outcomes in your logic model, are you able to collect this information in your data system?
- Ask your team if there are any unintended consequences of the changes you have made.

### *Collect*

- Collect input from key stakeholders. Share potential revisions with a selected group of people to get feedback. This might include a few key board members, internal managers, or front-line staff. Be sure to include a few program participants to understand how changes might impact the people you serve.

### *Communicate*

- Communicate changes with all internal staff. In your messaging, share information about what prompted any change (e.g., new funding opportunity, community needs assessment). Be open and transparent about how you gathered and incorporated feedback from stakeholders. Connect changes back to your overall mission to keep all staff on the same page.
- Communicate changes as necessary with funders, board members, community partners, evaluators, and others. Consider whether the changes would be appropriate to share with the public through channels such as your website and social media.

## Prepared by

James Bell Associates
3033 Wilson Boulevard, Suite 650
Arlington, VA 22201
(703) 528-3230
www.jbassoc.com

Amanda Thomson, M.P.P.
Deputy Project Director
Thomson@jbassoc.com

Allison Meisch, Ph.D.
Project Director
Meisch@jbassoc.com

Suggested citation: Thomson, A., & Meisch, A. D. (2021). *Keeping the life in living documents: How to ensure that your logic model and fidelity tools stay up to date.* James Bell Associates.

## Disclaimer

This publication was developed by James Bell Associates under a contract from the Annie E. Casey Foundation. Its contents are the sole responsibility of the author and do not necessarily represent the official views of the Foundation.

jba JAMES BELL ASSOCIATES