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FACSPro From Logic Model to Annual Report

May 10, 2017

FACSPro from Logic Model to Annual Report

Understanding the process and purpose of the ROMA cycle as it relates to FACSPro. This session will include the creation of a logic model, how tasks and interventions are used on action plans, and how it all rolls together within FACSPro to populate the annual report. We will also cover how to collect indicator counts for programs not tracked in FACSPro.

What is ROMA?

- ROMA is a **process** to run a successful program
- ROMA stands for "Results Oriented Management and Accountability"
- ROMA is **not just reporting**, rather an entire cycle of actions followed to run a successful program
- The actions followed in ROMA are summarized in the ROMA Cycle

The ROMA Cycle

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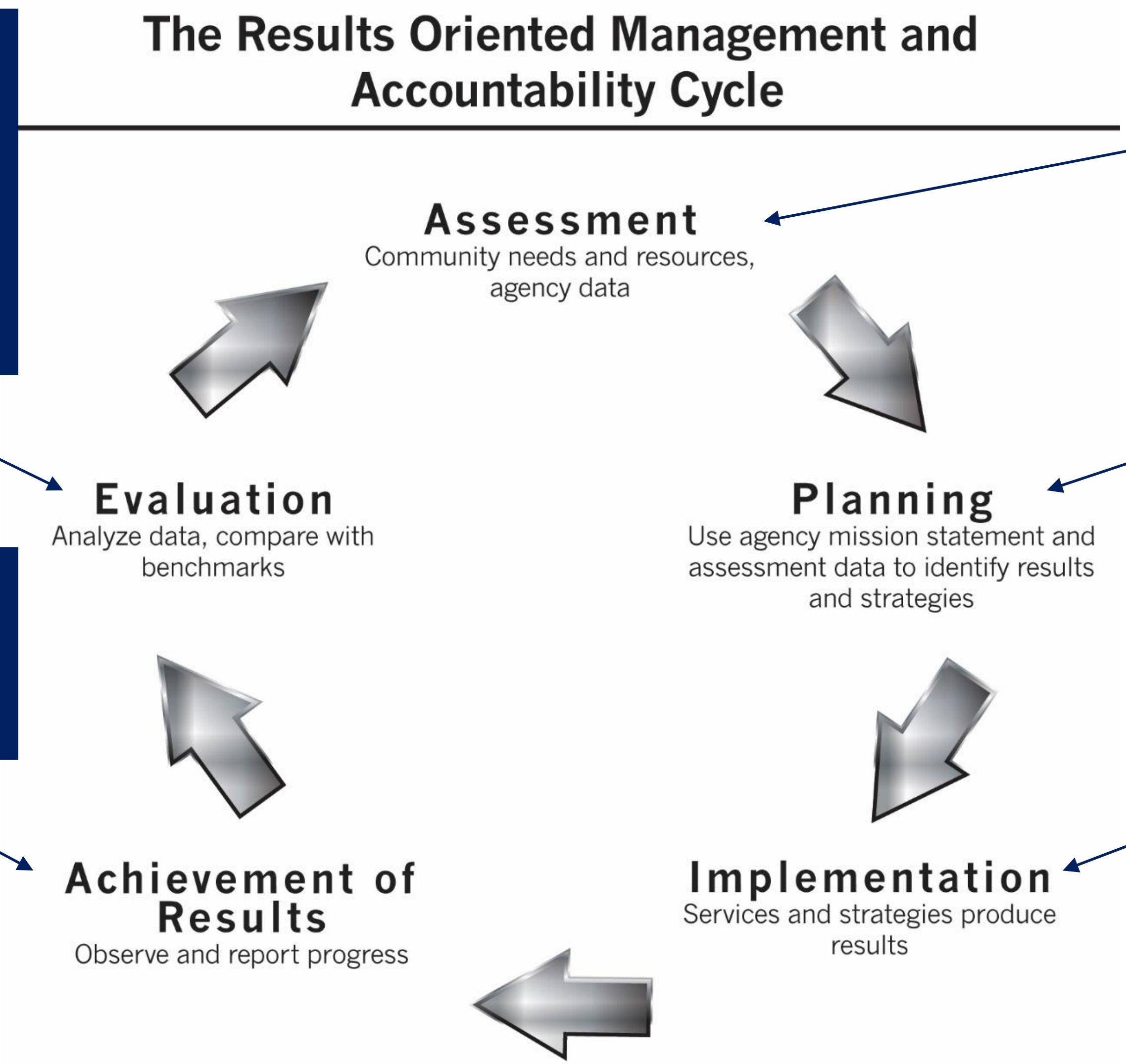
This should occur internally. How does your data look? Do you notice any trends? Were your results comparable to previous program years? If not, why? If so, does this look like a program standard?

Record the results of your programs – report through the IS Survey/CSBG Annual Report



Includes Community Needs Assessment, Key Informant Surveys, analyzed data from previous program years

Program plans (each year), CAP Plan (each year), Strategic Plan (every 3-5 years)

Running your services and programs!

The ROMA Cycle – Continued

- The ROMA Cycle summarizes the process of ROMA
- As the cycle suggests, the activities in ROMA are ongoing
  - When the assessment portion is completed for one program year, it leads into the assessment portion for the next program year

The Logic Model – A Tool for ROMA

- The Logic Model is used as a tool to capture program planning and results
- The Logic Model is a one page snapshot of the program plan, results and accountability

The Logic Model – Continued

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ROMA Logic Model – One Dimension
National ROMA Peer-To-Peer Training Program

Organization: **Program:** ☐ Family ☐ Agency ☐ Community

Identified Problem, Need, Situation	Service or Activity (Output) Identify the timeframe. Identify the # of clients served or the # of units offered.	Outcome (General statement of results expected)	Outcome Indicator Projected # and % of clients who will achieve each outcome.	Actual Results Actual # and % of clients who achieve each outcome.	Measurement Tool	Data Source, Collection Procedure, Personnel	Frequency of Data Collection and Reporting
(1) Planning	(2) Intervention	(3) Benefit	(4) Benefit	(5) Benefit	(6) Accountability	(7) Accountability	(8) Accountability
Need	Service	Outcome	Outcome Indicator	Actual Results	Measurement Tool	Data Source, Procedure, Personnel	Frequency
Mission:						**Proxy Outcome:** Yes or No	

National Peer-To-Peer (NPtP) ROMA Training Program, "ROMA for Community Action Agencies and CSBG Eligible Entities," ©1998, F. Richmond, B. Mooney, The Center For Applied Management Practices, Camp Hill, PA. Modified with funding from the US Department of Health and Human Services – Office of Community Services

Logic Models in FACSPro

- Logic Models are created and Maintained in the ApplicationPro module in FACSPro
- Agency programs must be setup before a logic model can be created.
- CAAs need to verify their action plan setup before creating a logic model
  - Changes to the Action plan setup can effect logic models
- Action Plan interventions will auto-populate the Logic Model actual results column.
- Logic Model reports can be used to demonstrate the CAA program progress throughout the program year.
- Logic Model setups can be copied from year to year.
  - At the point of Application creation (Copied all previous logic model setups)
  - At the new logic model creation (Copy a single previous logic model from the same system program)

ApplicationPro – Creating a New Application

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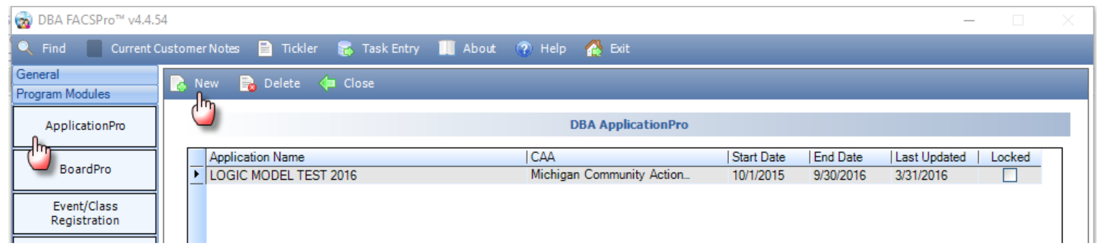
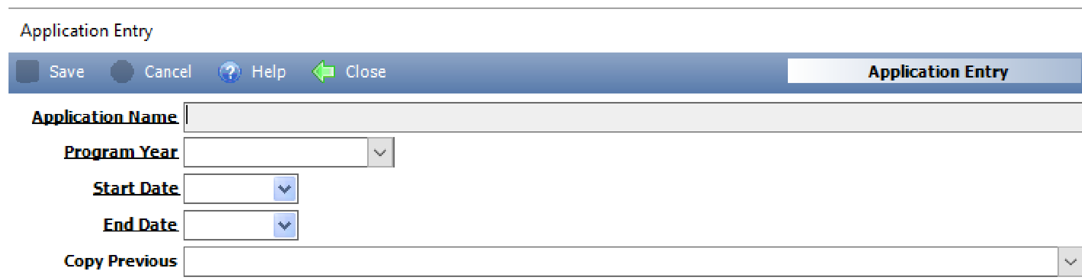
A new Application is required to be created each Fiscal Year.
The application is what holds all of your program logic models for that fiscal year.

Go to [Program Modules] » [ApplicationPro]

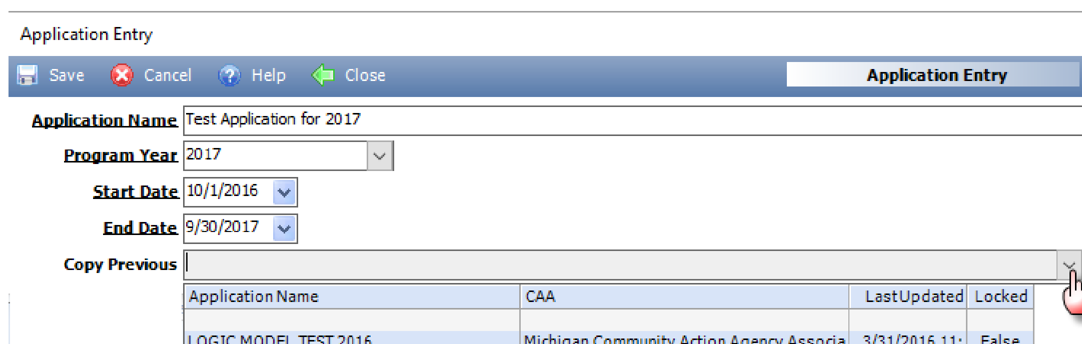


Click [New]



Complete all of the information for the Fiscal Year that you are creating an Application for.

- *If your programs are very similar to a previous year then you can use the "Copy Previous" drop-down to copy all of the logic models from a previous application.*



Click [Save]

ApplicationPro – Creating a New Logic Model

When creating a new logic model you have the option to copy a previously created one under the same system program.

Go to [Program Modules] » [ApplicationPro]

Select the Application that you need to add a logic model to.

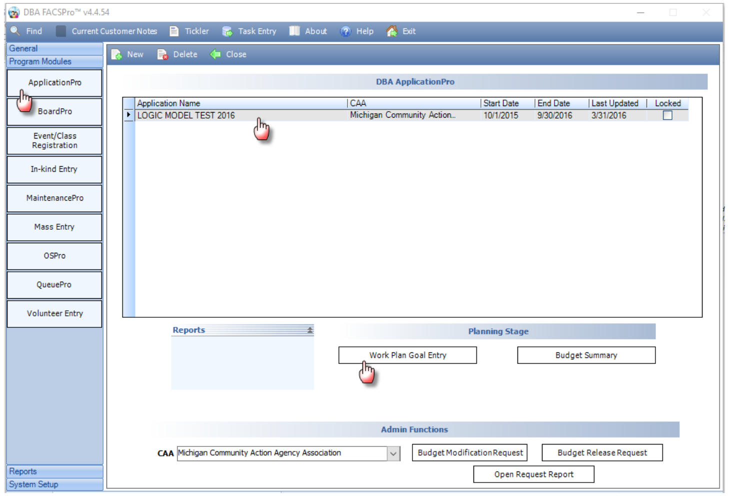
Click [Work Plan Goal Entry]

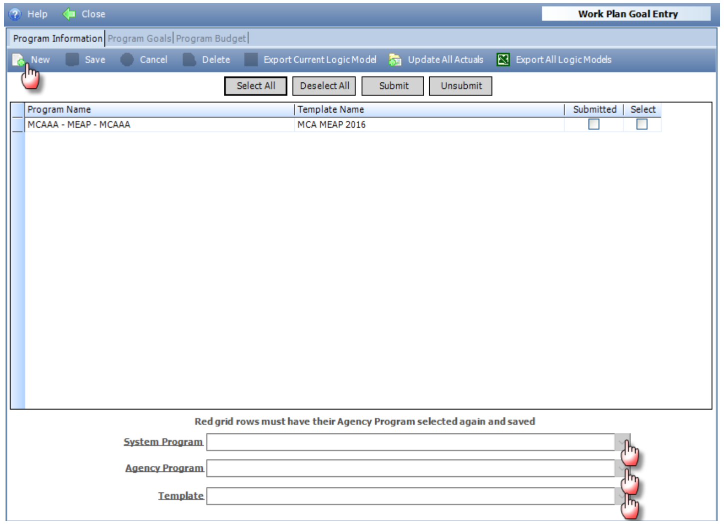
A list of the logic models that have already been created for that application will appear.

Click [New]

Complete the three drop-down lists to select your System Program, Agency Program, and Action plan that will be used for this logic model

Click [Save]

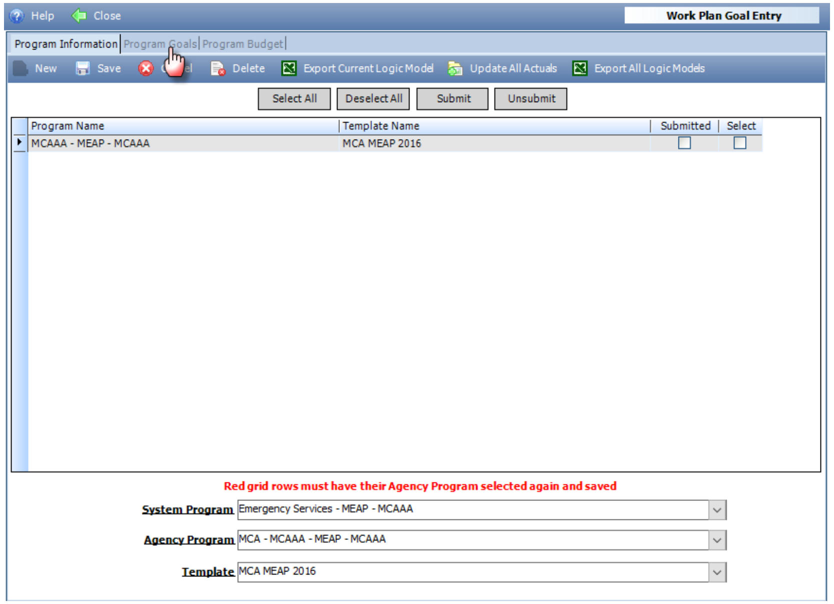




ApplicationPro – Creating a New Logic Model

Select the newly created Logic Model and click on the [Program Goals] tab at the top.

Click [Create/Edit Logic Model]



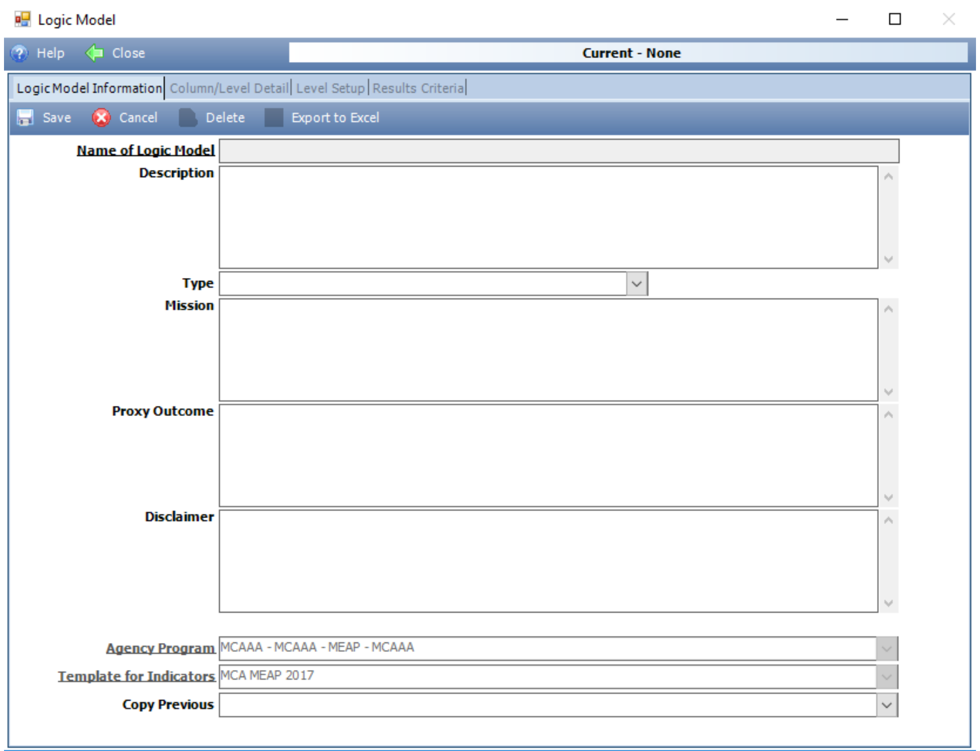
ApplicationPro – Creating a New Logic Model

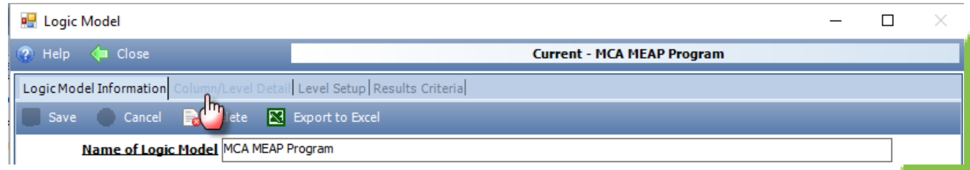
Complete all of the information pertaining to the Agency Program that the logic model is for.

- *If you need to copy a previous logic model select it from the "Copy Previous" drop-down at the bottom.*

Click [Save]

Click on the [Column/Level Detail] tab at the top to begin filling in / editing (if copied) the different sections of the logic model.





ApplicationPro –
Logic Model – Column 1 (Need)

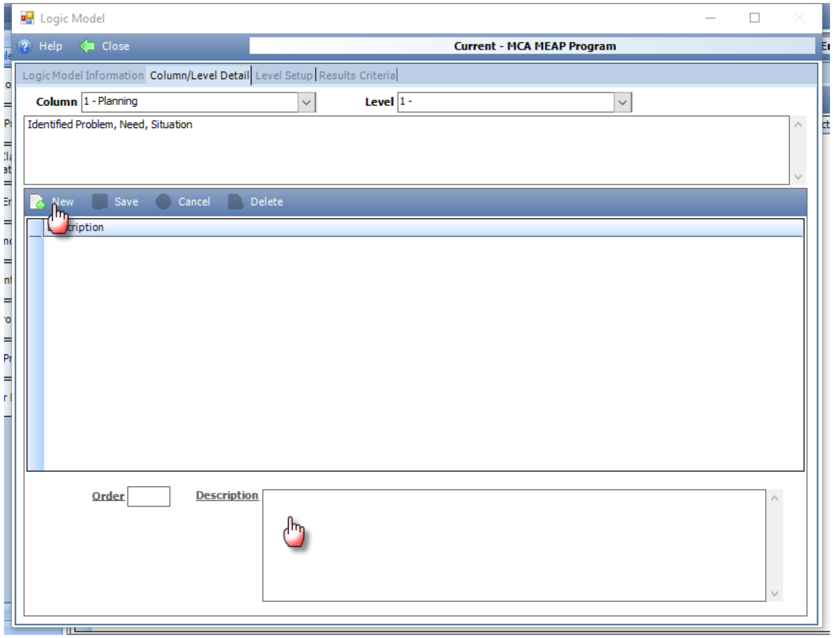
Starting with Column 1 – Planning (Need):

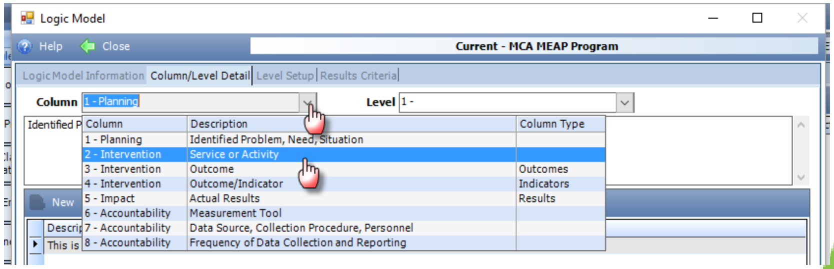
Click [New] and fill out the description box at the bottom of the screen to identify:

- problem, need, or situation that this program will address.

Click [Save]

Click the “Column” drop-down list and select Column 2





ApplicationPro –
Logic Model – Column 2 (Service)

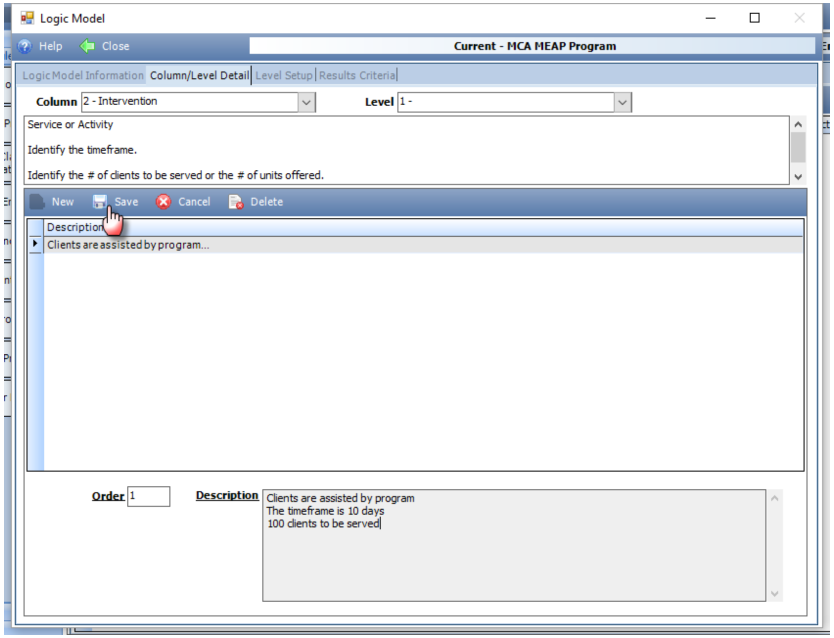
With Column 2 – Intervention (Service) selected:

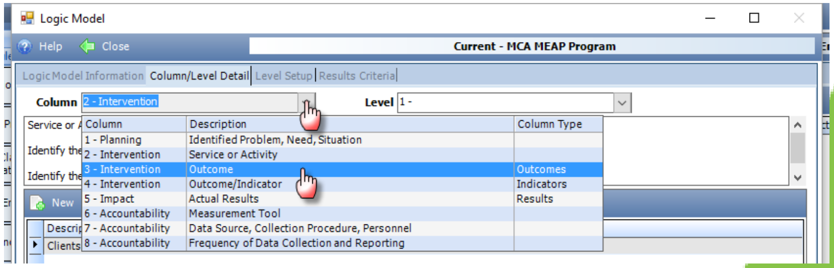
Click [New] and fill out the description box at the bottom of the screen to identify:

- Service or activity that is expected to produce an outcome
- Timeframe
- # of clients to be served or # of units offered

Click [Save]

Click the “Column” drop-down list and select Column 3





ApplicationPro – Logic Model – Column 3 (Outcome)

With Column 3 – Intervention (Outcome) selected:

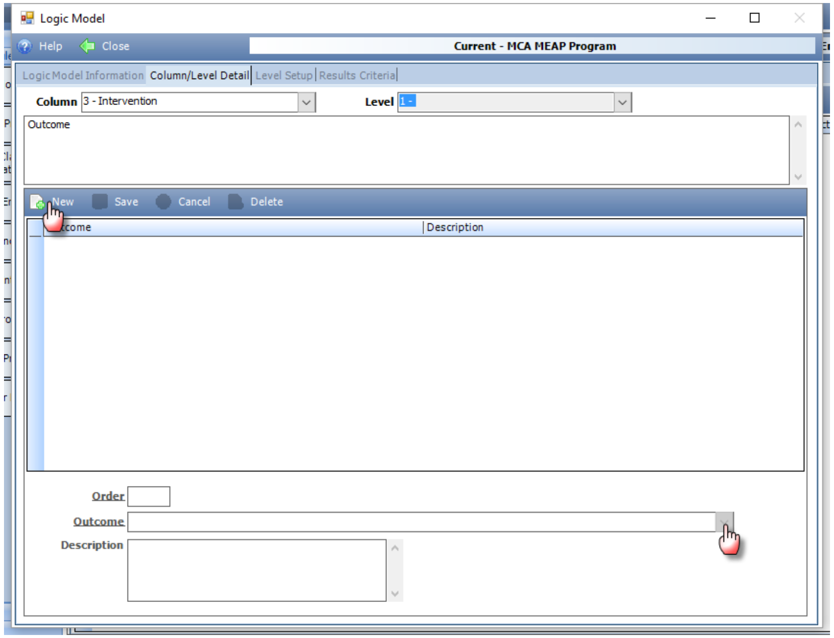
Click [New] and select the outcome that is expected in the “Outcome” drop-down list at the bottom of the screen. Use the “Order” box to place the outcomes in the order they should appear on the logic model (required).

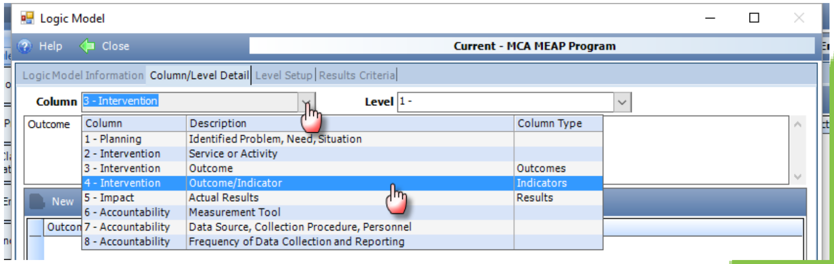
This drop-down is populated by the setup of the action plan template.

Click [Save]

If more than one outcome is expected then repeat the process by clicking [New] and selecting another outcome.

Click the “Column” drop-down list and select Column 4





ApplicationPro –
Logic Model – Column 4 (Outcome Indicator)

With Column 4 – Intervention (Outcome Indicator) selected:

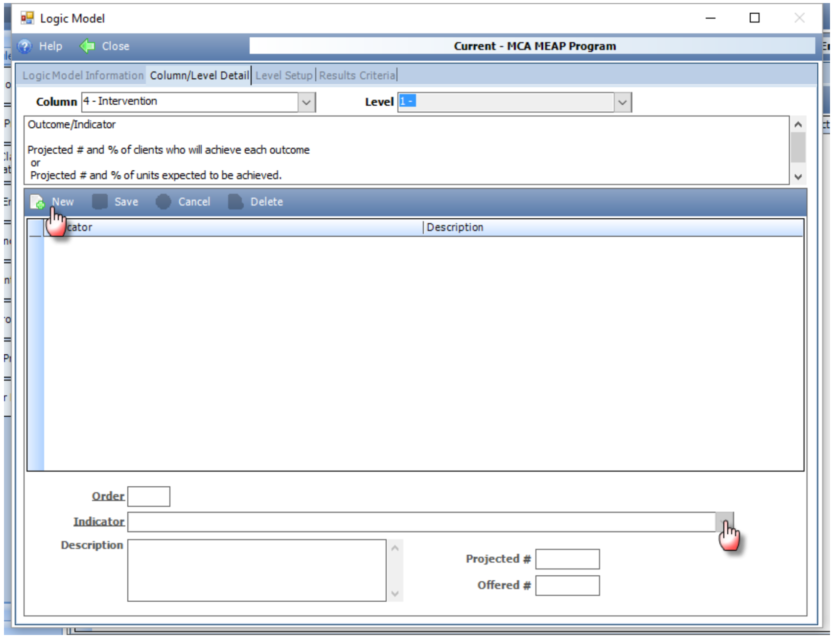
Click [New] and select the indicator that will be used to report the outcome from the "Indicator" drop-down list at the bottom of the screen. Use the "Order" box to place the indicators in the order they should appear on the logic model (required). Enter the project # of units/clients that are expected to achieve the outcome and the number of units/clients that the program will be offered to.

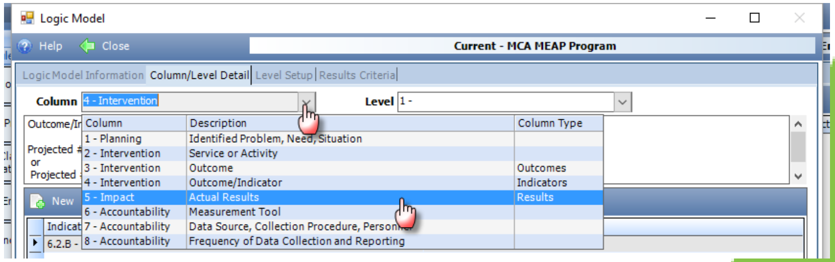
This drop-down is populated by the setup of the action plan template.

Click [Save]

If more than one indicator is to be used then repeat the process by clicking [New] and selecting another Indicator.

Click the "Column" drop-down list and select Column 5





ApplicationPro – Logic Model – Column 5 (Actual Results)

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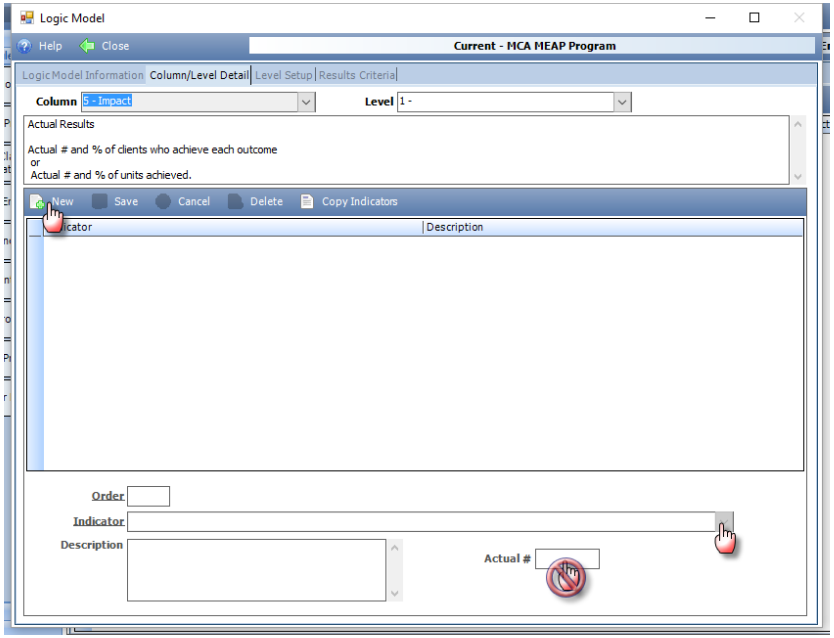
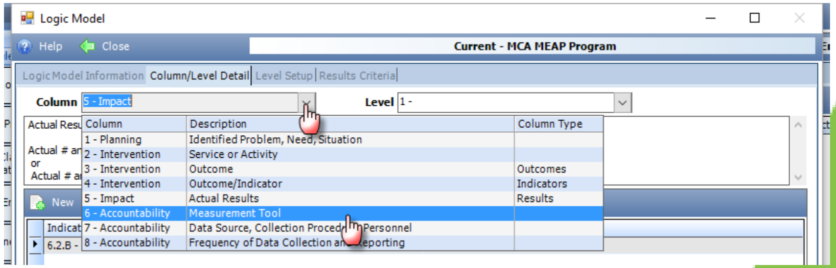
With Column 5 – Impact (Actual Results) selected:

Click [New] and select the same indicator(s) that were selected in column 4 in order for the logic model to populate with actual results from action plans as they are completed. There is no need to fill in the actual # as it will be pulled from the action plans that are created and completed.

Click [Save]

Click the "Column" drop-down list and select Column 6





ApplicationPro –
Logic Model – Column 6 (Measurement Tool)

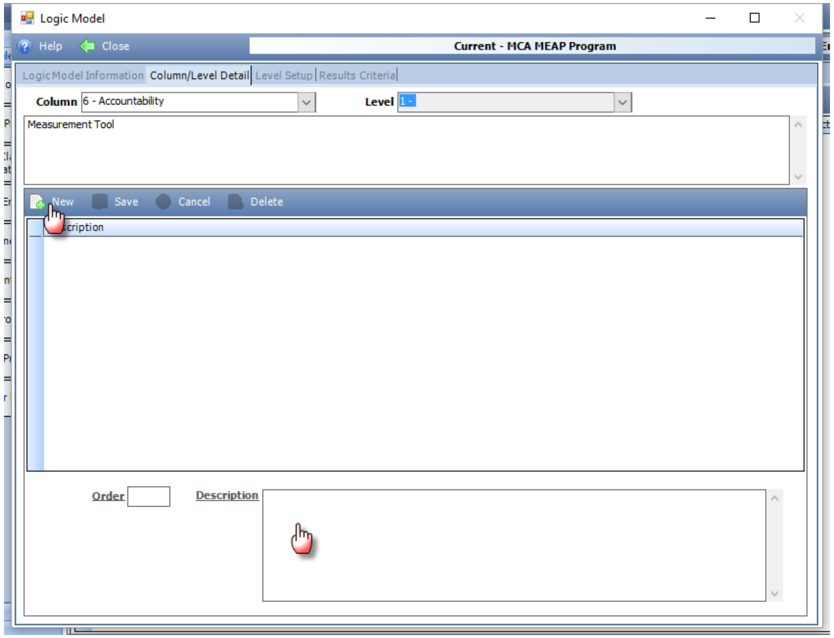
With Column 6 – Accountability (Measurement Tool) selected:

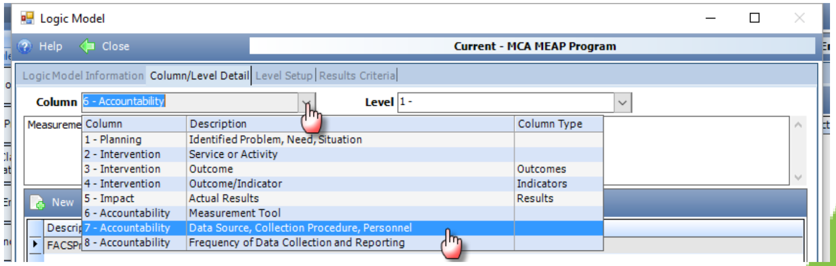
Click [New] and fill out the description box at the bottom of the screen to identify:

- The type of tool that will be used to collect/measure the outcome(s).

Click [Save]

Click the "Column" drop-down list and select Column 7





ApplicationPro –
Logic Model – Column 7 (Data Source, Procedure, Personnel)

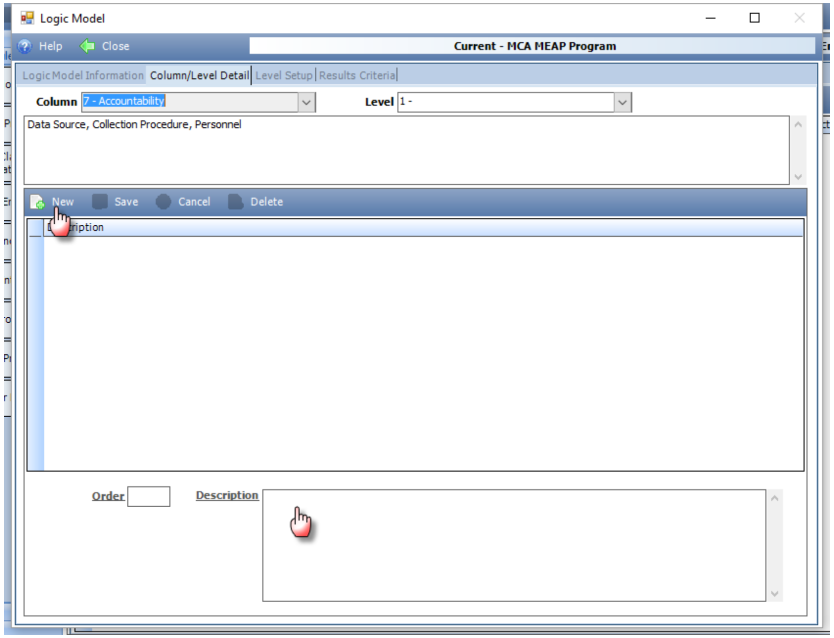
With Column 7 – Accountability (Data Source, Procedure, Personnel) selected:

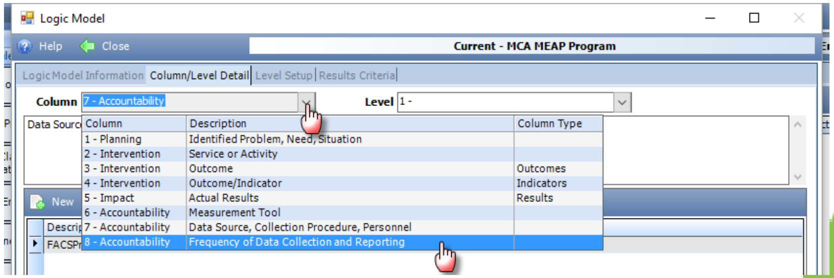
Click [New] and fill out the description box at the bottom of the screen to identify:

- The sources of data
- How the data is collected
- Staff assigned to the task(s)

Click [Save]

Click the "Column" drop-down list and select Column 8





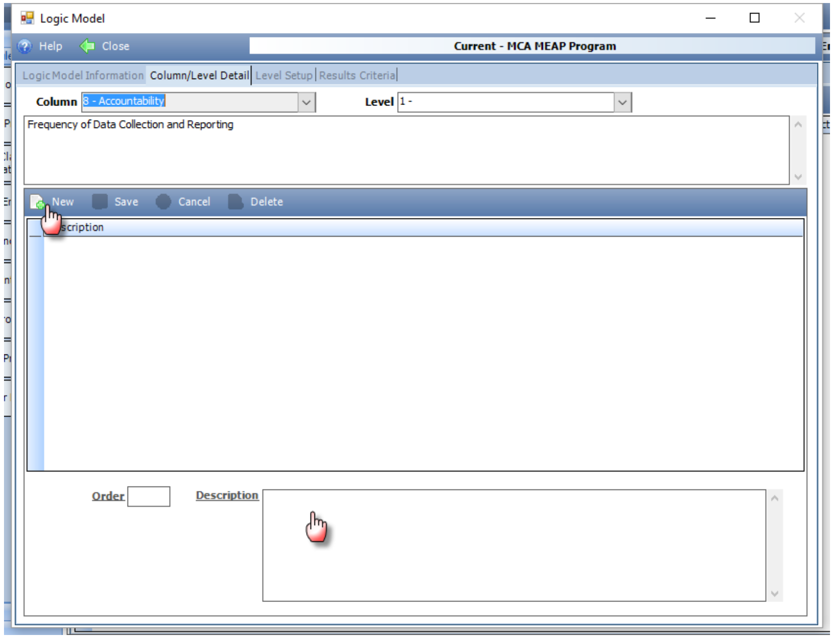
ApplicationPro –
Logic Model – Column 8 (Frequency)

With Column 8 – Accountability (Frequency) selected:

Click [New] and fill out the description box at the bottom of the screen to identify:

- How often the data is collected and reported both internally and externally.

Click [Save]



The logic model setup has now been completed!!

Building a Logic Model

A. Identify the name of the program or service at the top of the logic model.
B. Identify whether it is a family, agency, or community logic model.
C. Write the mission statement for the program or service.
D. Fill out the Columns:

- **Identify the Need, problem, or situation** to be addressed in Col. 1.
- **Identify the Service or activity** that is expected to produce the outcome. In Column 2, identify the service or activity, the number of clients estimated to be served, or number of units to be offered, and a timeframe.
- **Identify the Outcome.** In Column 3, write the broad statement(s) about the outcome that is expected, without numbers or a percentage.
- **Identify the Outcome/Indicator.** In Column 4, write the outcome/indicator(s) that matches the outcome(s) in Column 3 that you **estimate, or project.** This includes the total number of clients who are expected to achieve the outcome within the established timeframe, stated as a fraction (using this number as the numerator and the number expected to receive the service as the denominator).
- **After the service has been delivered** you will identify the actual number who achieved the outcome within the established timeframe, and the actual number of clients who received the service. In Column 5, enter the number of clients who achieved the outcome/indicator, and calculate the actual percent of success. As in Column 4, this is stated as a fraction (with the number achieving the outcome as the numerator and the number who received the service as the denominator).
- **Identify the Measurement Tool.** In Column 6, identify the type of tool used to collect or measure the outcome.
- **Identify the Data Sources, Collection Procedures, and Personnel.** In Column 7, describe the sources of data, how it is collected, and staff assigned to the task(s). Be explicit and provide detail both for activity inside and external to the agency.
- **Determine the Frequency of Data Collection and Reporting.** In Column 8, describe how often data is collected and reported within and outside the agency. Provide explicit detail and documentation for this process.

E. Indicate if a Proxy Outcome is used in the Logic Model.

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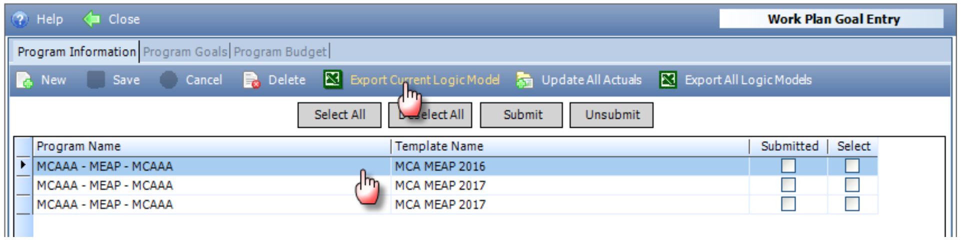
Additional Detail to Logic Model Building

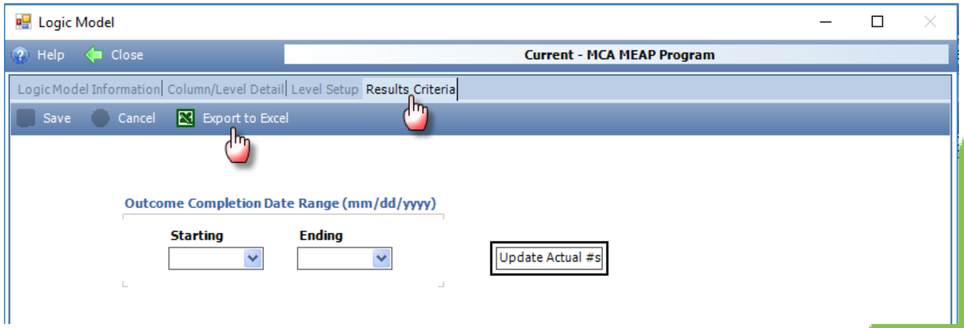
ApplicationPro –
Logic Model – Reporting

Now that the logic model has been created the logic model can be exported and viewed in the standard logic model format.



It can be accessed two ways:

- From the application screen
  - ❖ Select the logic model from the list and click [Export Current Logic Model]



- From the logic model setup screen
  - ❖ Click on the [Results Criteria] tab
  - ❖ Click [Export to Excel]

This will open the logic model in excel which can then be printed or saved digitally.

ApplicationPro – Editing an Existing Logic Model

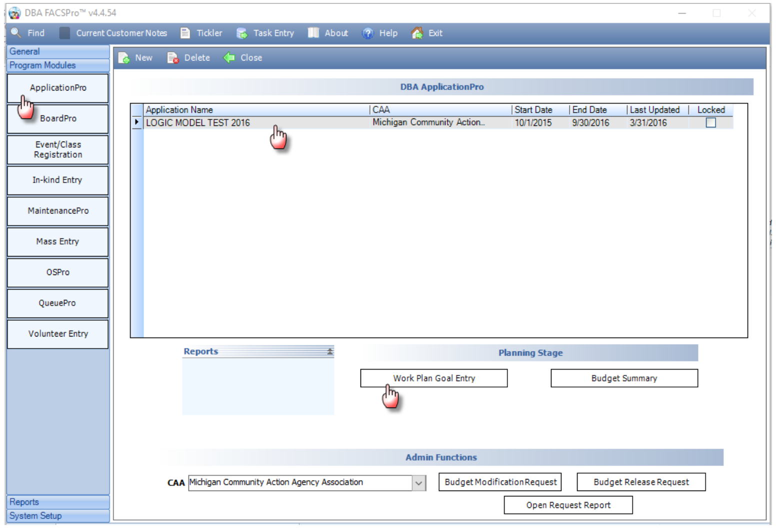
Go to [Program Modules] » [ApplicationPro]

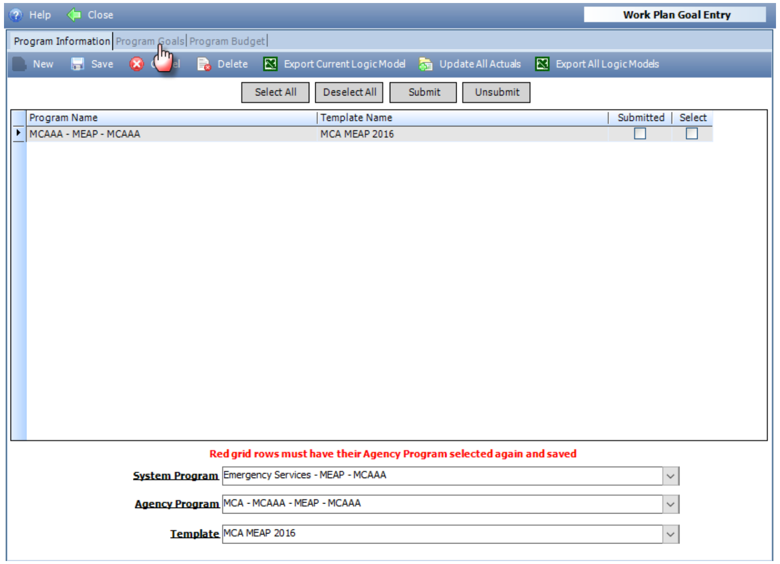
Select the Application that contains the logic model to edit.

Click [Work Plan Goal Entry]

A list of the logic models that have already been created for that application will appear.

Select the logic model and click the [Program Goals] tab.





ApplicationPro – Editing an Existing Logic Model

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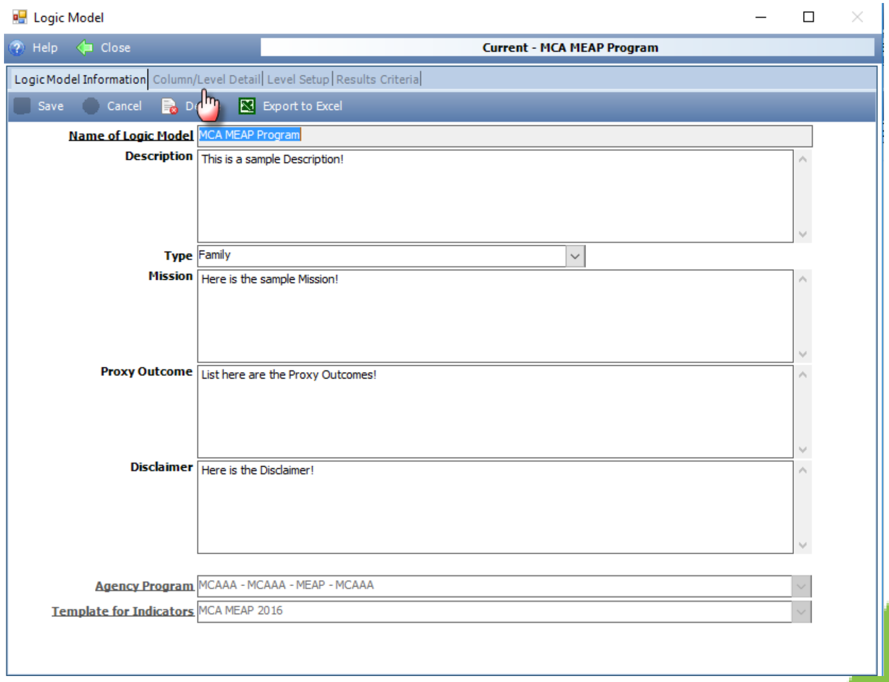
Click [Create/Edit Logic Model]

Edit anything in the Logic Model Information as needed or click the [Column/Level Detail] tab to edit the columns of the logic model.

Column edits are made the same way as they are when setup as new. Click [Save] as changes are made to any areas of the logic model.



ApplicationPro –
Logic Model – Reporting, Continued

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MCA MEAP Program							
Michigan Community Action Agency Association							
							AppPro: LOGIC MODEL TEST 2016
Program: MCAAA - MEAP - MCAAA		**Type: Family**					**Date Range: 10/01/2015 - 09/30/2016**
Identified Problem, Need, Situation	**Service or Activity** **Identify the timeframe.** **Identify the # of clients to be served or the # of units offered.**	**Outcome**	**Outcome/Indicator** **Projected # and % of clients who will achieve each outcome** **or** **Projected # and % of units expected to be achieved.**	**Actual Results** **Actual # and % of clients who achieve each outcome** **or** **Actual # and % of units achieved.**	**Measurement Tool**	**Data Source, Collection Procedure, Personnel**	**Frequency of Data Collection and Reporting**
(1) Planning	**(2) Intervention**	**(3) Intervention**	**(4) Intervention**	**(5) Impact**	**(6) Accountability**	**(7) Accountability**	**(8) Accountability**
This is my sample problem number 1	Clients are assisted by program The timeframe is 10 days 100 clients to be served	6.2 Emergency Assistance - Low-income individuals and families are served through emergency assistance.	75 of 100 or 75% of 6.2.B - Emergency fuel or utility payments funded by LIHEAP or other public and private funding sources	0 of 100 or 0% of 6.2.B - Emergency fuel or utility payments funded by LIHEAP or other public and private funding sources	FACSPro	FACSPro client action plans	Daily collection Weekly reporting
Mission:	Here is the sample Mission!						
Proxy Outcome:	List here are the Proxy Outcomes!						

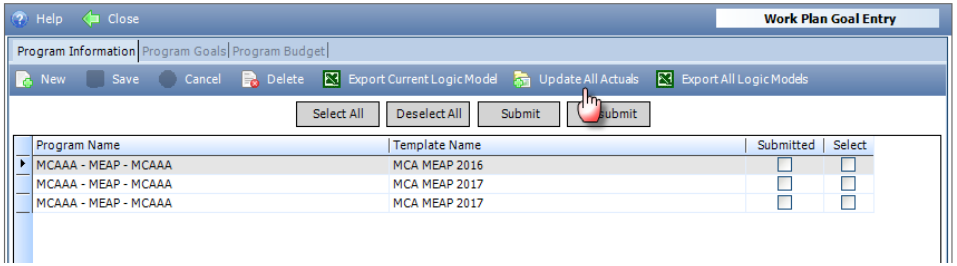
Here is the Disclaimer!

ApplicationPro –
Logic Model – Reporting, Continued

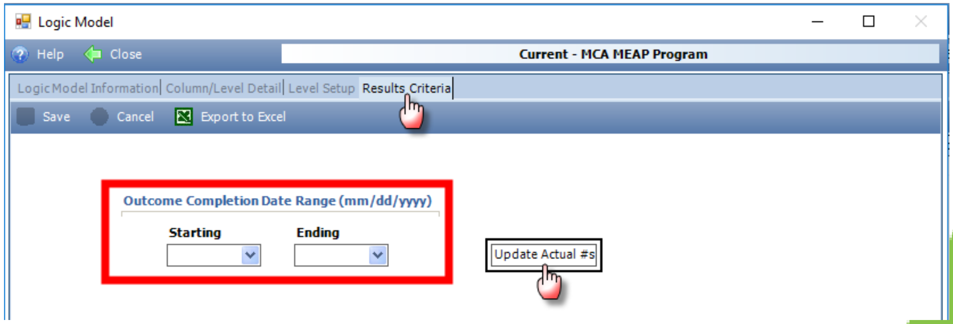
After there has been some data entered for the program the actual outcomes can be updated on the logic models before exporting them to excel.

This can be done two ways:

- From the application screen (All Logic Models):
  - ❖ Click [Update All Actuals]



- From the logic model setup screen (Single Logic Model):
  - ❖ Click on the [Results Criteria] tab
  - ❖ Enter the date range you want to use for the actual results.
  - ❖ Click [Save]
  - ❖ Click [Update Actual #s]



Logic Models in FACSPro

How do they work within FACSPro?

- Interventions on the logic model that have an actual completion date will be included in the logic model actual results after using one of the two processes for updating the logic model with actual results.
- Action plan tasks have no effect on the Logic Models.
  - Tasks are there to provide an outline of tasks to be completed by staff or to collect additional information for the program or the agency.
- The numbers that are setup as projected outcomes are populated on the annual report as " II.) # Expected to Achieve Indicator (Target)"
- If a task or intervention has an actual completion date within the reporting period of the Annual Report that client's demographic data will be included in the Annual Report.

Annual Report in FACSPro

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Where do the numbers come from?

- Interventions that are dated within the reporting period are included in the NPI counts on the IS Report. That client with the dated NPI will also be included in the "I.) # Enrolled in Program(s)" on the IS Report for that indicator(s).
- If a client is enrolled in a program before the end of the reporting period, and there is a default NPI on the action plan, and that action plan is "In Progress" then that client will be counted under "I.) # Enrolled in Program(s)"
- If a program is not entered into FACSPro through action plans then those NPI counts need to be entered through the Mass Entry module.
    - This will not incorporate any demographic data therefore it is not the recommended method of data reporting.

Additional information is available in the FACSPro document center for how data is mapped to the Annual Report ([Document Center] » [FACSPro Docs] » "IS Report Data Mapping Guide")

Mass Entry

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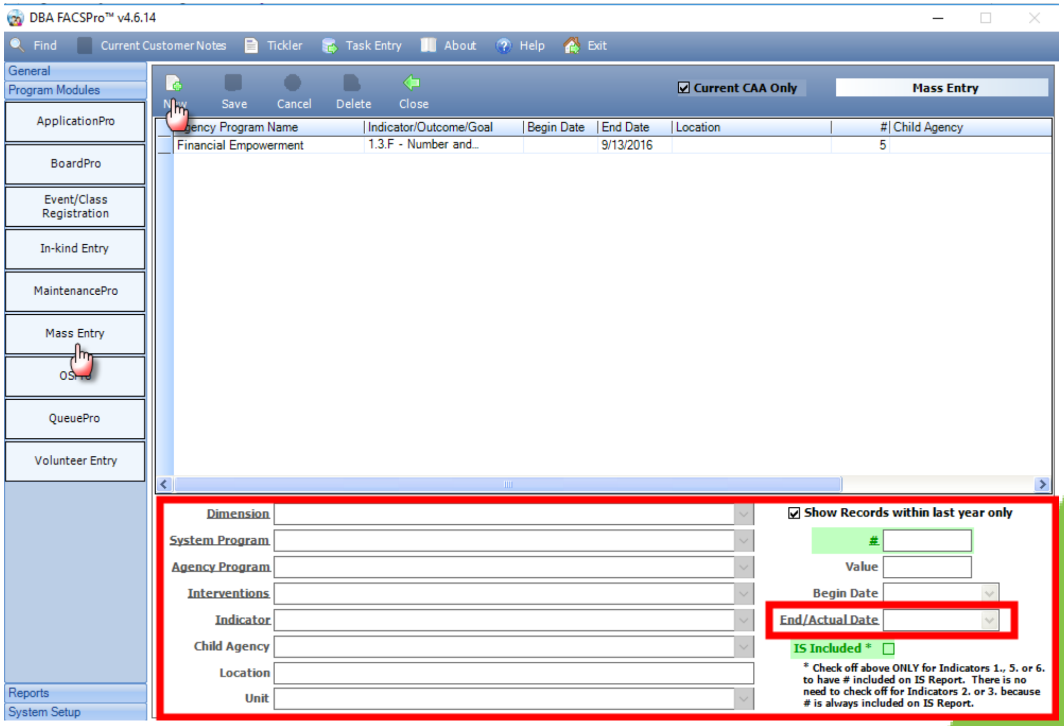
In order to report NPIs that are not collected via action plans the counts must be entered using the Mass Entry Module.

Go to [Program Modules] » [Mass Entry]

Click [New] to create a new entry or select the entry that needs to be corrected.

Complete the information in the lower section to navigate through the dimension, system program, agency program, intervention, and indicator that is being reported. (All of the underlined fields are mandatory)

Click [Save]



The information is pulled into the Annual Report based on the "End/Actual Date" so make sure that the date in that field falls within the reporting period that it should.

FACSPro Contact Information

- If CAA FACSPro System admins need assistance please contact the FACSPro Helpdesk.

- FACSPro Helpdesk for Michigan is operated by Keith Schafer (MCA), Maddy Kamalay (MCA), Benjamin Gulker (DHHS-BCAEO), and is monitored by DBA Technologies (FACSPro Vendor)

- Please make sure to contact mihelp@dbafacspro.com so that it is distributed to everyone on the helpdesk.

Questions?

Thank you