

INSTRUCTIONS FOR USING THE ELOGIC MODEL™ EVALUATOR

BACKGROUND

The eLogic Model™ Evaluator is an electronic management and reporting tool that has been integrated into the City of Jersey City, Division of Community Development, CSBG Quarterly Activity Report. Developed by The Center for Applied Management Practices, Inc., the eLogic Model™ Evaluator supports the use of logic model technology for active program management, monitoring and reporting. By using a logic model structure that supports identification of community and people Needs, Services/Activities and Outcomes; grantees and funders are better able to determine the effectiveness of their programs in helping people and improving the communities in which they live.

It is required that each organization seeking CSBG funding must submit a logic model of their program/service. The Division of Community Development has created 23 Master eLogic Models from which all applicants will create their own logic model. Your organization is associated with one of the Master eLogic Models listed below:

- Affordable Housing
- Alcohol Abuse
- Baseball and Little Leagues
- Case Management for Emergent Needs
- Case Management Towards Self-Sufficiency
- Child Care Food Program
- Community Decision Making
- Day Care
- Education and Training
- Emergency Shelter
- Employment Readiness
- Financial Literacy
- First Time Homebuyer Education Counseling
- Food Bank
- Food Pantry
- Homelessness Prevention
- Housing Counseling
- Independent Living Support Services
- Parent Development
- School Readiness and Child Services
- Volunteer Income Tax Assistance (VITA)
- Youth After School and Summer Programs
- Youth-At-Risk

Please select the Master eLogic Model™ for your organization and create a logic model of your program for which you are seeking funding. Additional instructions will be provided for reporting using the standard email system.

GETTING STARTED – SECURITY AND THE USE OF "MACROS"

The eLogic Model™ Evaluator when downloaded and opened may prompt a "Macro" alert on your screen. "Macros" are a form of programming used in Excel to enable additional functionality. You will need to "enable" the "Macros" to use all functions on your eLogic Model™ Evaluator. After submission of your eLogic Model™ Evaluator award application, you may reset your security levels to their original settings. Depending on your version of Excel™, there are several steps you must take in order to use the eLogic Model™ Evaluator. A description is provided below for the three most common versions of Excel™ in use today, one of which is probably installed on your computer.

NOTE: If you do not enable the "Macros", your eLogic Model™ Evaluator will not function properly. If you are working in a network, and you cannot control your desktop settings, contact your system administrator for support. Some of you may already be very familiar with Macros. If you are not, here are some easy step-by-step instructions for you to follow to enable the Macros.

Excel™ 2003 - There are four levels of security regarding the use of "Macros": Very High, High, Medium, and Low. If upon opening the eLogic Model™ Evaluator the dialog box states that you must change your Security setting to enable "Macros", your security settings are either set to Very High or High and you must take the following steps: Go to the toolbar at the top of the screen and click on "Tools". Then click "Options" and then click the tab labeled "Security" located on the top right of the window. At the bottom right of the window, click the button that says "Macro Security" and select Medium as your setting. Click "OK" and then click "OK" in the Options window. Close your eLogic Model™ Evaluator. Re-open your eLogic Model™ Evaluator. You will now receive a dialog box with the message "Security Warning". Click on the button at the bottom that says "Enable Macros". Your eLogic Model™ Evaluator will open and be fully functional.

If upon opening the eLogic Model™ Evaluator the dialog box gives you an option to enable "Macros" at that moment, it means that Security is set to Medium. All you need to do is to click the button at the bottom of the dialog box that says "Enable Macros". Your eLogic Model™ Evaluator will open and be fully functional.

If upon opening the eLogic Model™ Evaluator there is no dialog box, your Security setting is set on "Low" and your Macros are already enabled. No additional step is needed.

Excel™ 2000 - There are three levels of security regarding the use of "Macros": High, Medium, and Low. The High security setting automatically disables most Macros and does not alert you to the action. If, when entering Services/Activities in Column 3, or Outcomes in Column 5, you select "other," the word "other" appears and remains in the cell, the Macro is not functioning. Save and close changes you have made thus far. Then from the menu, select "Tools," "Macro," "Security". A dialog box will open. Click on the "Security" TAB and select "Medium," then click "OK." Reopen your eLogic Model™ Evaluator. A dialog box will open. Select "Enable Macros". Your eLogic Model™ Evaluator will open and be fully functional.

If your copy of Excel is already set to "Medium" security, the enable Macros dialog box will appear and you can proceed as above.

Getting Started – The Workbook

When you open your eLogic Model™ Evaluator, you will see Tabs along the bottom of the screen in the Workbook. It is these Tabs that are referred to in the text below. The eLogic Model™ Evaluator is built on an Excel™ platform and follows all Excel™ conventions. You do not need to know Excel™ to work with the eLogic Model™ Evaluator.

Column 1 – Policy

Review the CSBG Goals by clicking on the Tab labeled, "Goals" at the bottom of the Workbook. You do this by clicking the mouse in one of the cells in Column (1). A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of CSBG Goals will appear. Select one of the CSBG Goals by clicking it. If you make an error and want to remove the listing, select the cell and click the DELETE KEY on your keyboard. The item will be deleted.

To associate the Goals to particular Services/Activities, select a Goal in Column 1 and then select a related Service/Activity in Column 3, Programming. If there are several Services/Activities to be completed related to the Goal, select all the related Services/Activities and associated outcomes and then skip a row before entering the next goal.

Repeat this process until you have selected all CSBG Goals that apply to your application.

Column 2 – Planning

Under the “Planning” Column (2), select a “Problem, Need, Situation” statement(s). Do this by clicking the mouse in one of the cells of this column. A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of “Problem, Need, Situation” Statements will appear. Select one or more of these Statements in the list by clicking it. Because the column is too narrow to show the full Statement in the dropdown list, you may wish to refer to the Tab labeled “Needs” to see the full Statements which can also be printed using your print function. Using your mouse, you can click on the shaded cell [D5] labeled “Problem, Need, Situation” and this will expand the cell. To return the cell to its original size, click again on cell [D5] labeled “Problem, Need, Situation.”

NOTE: When expanding and returning the cell to its original size, click once. Do not double click.

When you select a “Problem, Need, Situation” Statement, the full Statement will fill the cell. If you don’t want this Statement, you can simply click the dropdown arrow again and select another item; or, you can delete a Statement by selecting the cell and clicking the DELETE KEY on your keyboard. If you want to select more than one Statement, go to the next cell in the column and repeat the process, selecting the appropriate Statement. You can do this until you have selected all the Statements that are appropriate to your proposed program. The selections should reflect the problems, needs or situations identified in your proposal. There are many indicators of need from which to choose. Only select those that are relevant to your program or project and support what you plan to address and accomplish with the funding requested.

Column 3 – Programming

Under the “Programming” Column (3), select a Service/Activity. You do this by clicking the mouse in one of the cells of this column. A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of Services/Activities appears.

Select one of the Services/Activities in the list by first identifying the Domain and then clicking it. Because the column is too narrow to show the full Services/Activities in the dropdown list, you may wish to refer to the Tab labeled “Services” to see the full range of Services/Activities which can also be printed using your print function.

Using your mouse, you can click on the shaded cell [E5] Service or Activities/Outputs. This will expand the cell. To return the cell to its original size, click on shaded cell [E5] Service or Activities/Outputs.

NOTE: When expanding and returning the cell to its original size, click once. Do not double click.

NOTE: If the Services/Activities that you are looking for does not appear on the dropdown list, choose "Other" from the dropdown list. A dialog box will appear that says "Logic Model". Click "OK" and another dialog box will appear that says, "You have selected 'Other' which means that you must create a new Activity or Outcome and a Unit of Measure, are you prepared to do this Now?" ; click "Yes" if you wish to continue. You will see an input window that says, "Enter a new Activity or Outcome to your selection list". Enter your Service/Activity in the field provided and click "OK". A second window will appear that says, "Specify a Unit of Measure for the Activity or Outcome you entered". Enter the unit of measure in the field provided and click "OK". The new Service or Activity will appear in the Logic Model cell and it will be added to the dropdown list. **YOU ARE ONLY PERMITTED TO ADD A TOTAL OF THREE NEW SERVICES OR ACTIVITIES PER LOGIC MODEL.**

In the event that you want to delete, or change your newly created Service/Activity, click the Tab labeled Services at the bottom of your screen and then click cell [B1] "Click here to allow deletion of New Activities" at the top right of the window. A dialog box will appear that says "Click on a new Activity to delete it from you Logic Model", click "OK". A dialog box will appear that says "Caution! This will delete all instances of new services or activities in your Logic Model, do you wish to continue?" Click "Yes". The new Activity you added will be displayed with the prefix "new". You can only delete new Services or Activities.

There are many Services/Activities from which to choose. Only select those that are relevant to your program or project and support what you plan to address and accomplish with the funding requested.

To find out how to associate a service/activity and outcome to a CSBG goal and/or policy priority see the instructions posted to the web site.

Column 4 – Measure

Notice that as the Service/Activity you selected appears in Column 3, a corresponding Unit of Measure appears or populates in the Column 4, Measure. The Unit of Measure could be "persons", "dollars", "square feet", "houses", or some other Unit of Measure that relates to the selected Service or Activity. Immediately below the Unit of Measure are three blank cells. Enter the projected number of persons or units you are proposing to deliver or accomplish in the "Pre" column. When entering your projection in the "Pre" column, type the number in the cell and tab down or use your mouse to go to the next cell. If you click the Enter key, you will see the error message, "Run-time error '13':" If you see this message, click the button labeled End to continue. The "Run-time error '13':" will not affect your work.

Please note that the "Post" and the Year-to-Date (YTD) columns are locked.

Column 5 – Impact

Under Column 5, "Impact", select the Outcome that best corresponds to the "Problem, Need, Situation" Statement, Column 2 and Service or Activity, Column 3, that you just previously identified and selected for your logic model. This is the same procedure used for completing Column 3 and uses the same 21 domains for organizing Outcomes. When you select an Outcome from the dropdown list, a Unit of Measure automatically appears in the next column "Measure". Because the column is too narrow to show the full Outcome Statement in the dropdown list, you may wish to refer to the Tab labeled "Outcomes" to see the full range of Outcomes which can also be printed using your print function. Using your mouse, you can click on the shaded cell [J5] Outcome. This will expand the cell. To return the cell to its original size, click on shaded cell [J5] Outcome.

NOTE: When expanding and returning the cell to its original size, click once. Do not double click.

NOTE: If the Outcome that you are looking for does not appear on the dropdown list, choose "Other" from the dropdown list. A dialog box will appear that says "Logic Model". Click "OK" and another dialog box will appear that says, "You have selected 'Other' which means that "you must create a new Activity or Outcome and a Unit of Measure, are you prepared to do this Now?" ; click "Yes" if you wish to continue. You will see an input window that says, "Enter a new Activity or Outcome to your selection list". Enter your Outcome in the field provided and click "OK". A second window will appear that says, "Specify a Unit of Measure for the Activity or Outcome you entered". Enter the Unit of Measure in the field provided and click "OK". The new Outcome will appear in the Logic Model cell and it will be added to the dropdown list. **YOU ARE ONLY PERMITTED TO ADD A TOTAL OF THREE NEW OUTCOMES PER LOGIC MODEL.**

In the event that you want to delete, or change your newly created Outcome, click the Tab labeled Outcomes at the bottom of your screen and then click cell [B1] "Click here to allow deletion of New Outcomes" at the top right of the window. A dialog box will appear that says "Click on a new Outcome to delete it from your Logic Model", click "OK". A dialog box will appear that says "Caution! This will delete all instances of new outcomes in your Logic Model, do you wish to continue?" Click "Yes". The new Outcome you added will be displayed with the prefix "new". You can only delete new Outcomes.

Column 6 – Measure

As the Outcomes you selected appear in the cell, a corresponding Unit of Measure appears or populates in Column 6, Measure. The Unit of Measure could be "persons", "dollars", "square feet", "houses", or some other Unit of Measure that relates to the selected Service or Activity. Immediately below the Unit of Measure are three blank cells. Enter the projected number of persons or units you are proposing to deliver or accomplish in the "Pre" column. When entering your projection in the "Pre" column, type the number or date in the cell and tab down or use your mouse to go to the next cell. If you click the Enter key, you will see the error message, "Run-time error '13':" If you see this message, click the button labeled End to continue. The "Run-time error '13':" will not affect your work.

The "Post" and the Year-to-Date (YTD) columns are locked.

NOTE: You can adjust the look of your logic model by skipping rows, so that "Problem, Need, Situation", "Service or Activity" and "Outcome" are grouped or associated together.

CAUTION, DO NOT CUT & PASTE ITEMS FROM ONE COLUMN TO ANOTHER. For example, do not cut and paste an item from the "Problem, Need, Situation" column to the "Service or Activity" Column, or the "Service or Activity" Column to the "Outcome" Column. Doing so will produce an unstable worksheet which will behave erratically, requiring you to start over with a new blank eLogic Model™ Evaluator workbook.

Column 7 – Accountability

Under the "Accountability" Column (7), enter the tools and the process of collection and processing of data in your organization to support all project management, reporting, and responses to the Management Questions. This column provides the framework for structuring your data collection efforts. If the collection and processing of data is not well planned, the likelihood of its use to further the management of the program and support evaluation activity is limited. If data are collected inconsistently, or if data are missing, not retrievable, or mishandled, the validity of any conclusions is weakened.

The structure of Column 7 contains five components in the form of dropdown fields that address the Evaluation Process. You are responsible for addressing each of the five steps that address the process of managing the critical information about your project.

- A. Tools for Measurement
- B. Where Data Maintained
- C. Source of Data

D. Frequency of Collection
E. Processing of Data

You may select up to five choices for each of the five processes (A-E) that supports Accountability and tracks Outputs and Outcomes. Given the limited space, please identify the most frequent sources for the processes (A-E). As you proceed through the remaining components, B through E, specify those components in the same order as you selected the "Tools for Measurement" listed under item A. That is, if the first Tool is "Pre-post Test," then the first item under B "Where Data Maintained" must identify where the pre-post test data is maintained, and so on through E the first entry should pertain to "Pre-post Test." Likewise, if the second item in A is "Satisfaction Surveys," then specify the second item in B through E as it pertains to "Satisfaction Surveys."

A. Tools for Measurement. A device is needed for collecting data; e.g. a test, a survey, an attendance log, an inspection report, etc. The tool "holds" the evidence of the realized Output or Outcome specified in the logic model. At times, there could be multiple tools for a given event. A choice can be made to use several tools, or rely on one that is most reliable, or most efficient but still reliable. Whatever the tool, it is important to remain consistent throughout the project.

Instructions: Under Column 7, Accountability, select your choices of "Tools for Measurement" to Track Outputs and Outcomes. You do this by clicking the mouse in one of the cells of this column. A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of Tools appears. Select one or more of the Tools in the list by clicking it.

B. Where Data Maintained. A record of where the data or data tool resides must be maintained. It is not required that all tools and all data are kept in one single place. You may keep attendance logs at the main office files, but keep other tools or data such as a "case record" in the case files at the service site. It is important to designate where tools and/or data are to be maintained. For example, if your program has a sophisticated computer system and all data is entered into a custom-designed database, it is necessary to designate where the original or source documents will be maintained.

Instructions: Under Column 7, Accountability, select your choices of "Where Data Maintained." You do this by clicking the mouse in one of the cells of this column. A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of Where Data Maintained appears. Select one or more of the Where Data Maintained in the list by clicking it.

C. Source of Data. This is the source where the data originates. Identify the source and make sure that it is appropriate.

Instructions: Under Column 7, Accountability, select your choices of “Source of Data.” You do this by clicking the mouse in one of the cells of this column. A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of Source of Data appears. Select one or more of the Source of Data in the list by clicking it.

D. Frequency of Collection. Timing matters in data collection. In most instances, you want to get it while it occurs. Collect data at the time of the encounter; if impossible, when it is most opportune immediately thereafter. For example, collect report card data immediately upon the issuance of report cards. Do not wait until after the school year is over. Collect feedback surveys at the conclusion of the event, not a few months later when clients may be difficult to reach. Reporting can be done at anytime if the data is already collected. Another important aspect of this dimension is consistency. If some post tests are collected soon after the event, but others are attempted months later, the data are confounded by the differences in the timing. If some financial data are collected at the middle of the month and others at the end of the month, the data may be confounded by systematic timing bias.

Instructions: Under Column 7, Accountability, select your choices of “Frequency of Collection.” You do this by clicking the mouse in one of the cells of this column. A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of Frequency of Collection appears. Select one or more of the Frequency of Collection in the list by clicking it.

E. Processing of Data. This is where you identify the mechanism that will be employed to process the data. Some possibilities are: manual tallies, computer spreadsheets, flat file database, relational database, statistical database, etc. The eLogic Model™ Evaluator is only a summary of the program and it cannot accommodate a full description of your management information system. There is an implicit assumption that the grantee has thought through the process to assure that the mechanism is adequate to the task(s).

Instructions: Under Column 7, Accountability, select your choices of “Processing of Data.” You do this by clicking the mouse in one of the cells of this column. A little dropdown arrow appears. Click the dropdown arrow and a dropdown list of Processing of Data appears. Select one or more of the Process of Data in the list by clicking it.

I

INSTRUCTIONS FOR REPORTING PERFORMANCE TO CSBG

Please follow these instructions for reporting information in your Quarterly Activity Report. Agency Name, Program Name, Director and Report preparer must be filled out.

The reporting period is as follows:

1st Quarter	October, November, December
2nd Quarter	January, February, March
3rd Quarter	April, May, June
4th Quarter	July, August, September

The information you are reporting has to reflect one of the above quarterly time periods. It is expected that you will have information and client activity to report **every three (3) months**. Quarterly Activity Reports are due by the 10th working day after the quarter ends.

This is your opportunity to inform the Division of Community Development exactly how Jersey City residents are benefiting from your program.

I. STATISTICAL DATA

A. Quarterly Statistics

1. **New Participants** – All clients are new starting in October, 1st Quarter (See 1st Quarter Rule).
2. **Carry Overs** – Includes all clients previously served (there should be no Carry Overs in the first quarter).
3. **Reporting Period Level of Service** – Add New Participants and Carry Overs to get this number.

Note: The Total of Lines (1) + (2) equals Line (3)

1st Quarter Rule: All clients, including Carry Overs, are considered New Participants in the 1st Quarter.

Count New Participants only for Sections B – G

B. Ethnic Breakdown

Note: Hispanic is now an ethnicity category that cuts across all races. Those who are White, Asian, Black, Pacific Islander, American Indian, or other multi-racial may be counted as being Hispanic.

B1. Racial Categories

Identify the number of new clients who fit within the appropriate ethnic category. Although a person may identify themselves as Hispanic, they must also be placed in one of the following racial categories:

- a) American Indian or Alaska Native** - A person having origins in any of the peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.
- b) Asian** - A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand and Vietnam.
- c) Black or African American** - A person having origins in any of the Black racial groups of Africa. Terms such as Haitian or Negro can be used in addition to Black or African American.
- d) Native Hawaiian or Pacific Islander** - A person having origins in any of the Original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.