



Developing and Improving your Logic Model

Economic Mobility – Optimizing Program Design



Help Develop New Loan Opportunities: Join the RIIF Focus Group!

November 5th at 11:30AM PDT

REDF Impact Investing Fund (RIIF) is thrilled to introduce its upcoming **Growth & Mobility Fund** — **an initiative that will offer new, flexible loan opportunities just for CA RISE participants.**

Join us for an interactive virtual working session hosted by the RIIF team. We will use the time to learn about your capital needs and how these new loan opportunities can support your growth.

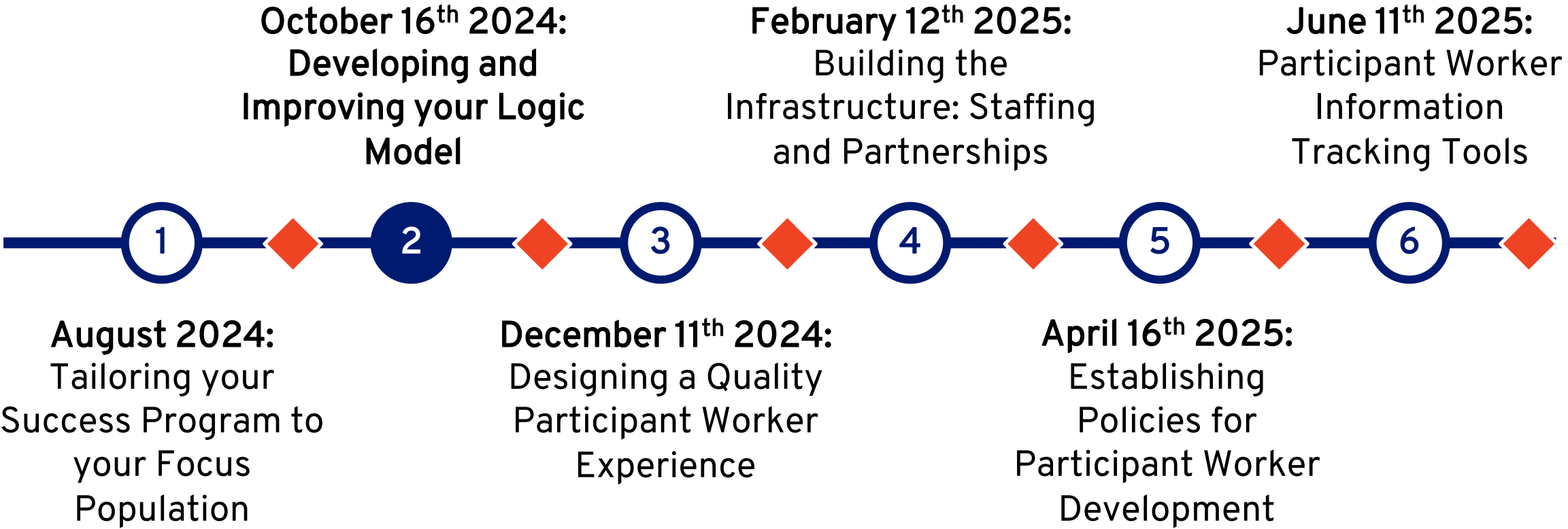
Your feedback will help shape the future of this initiative!



Register here:



Economic Mobility Optimize Program Design



 Optional Coaching Sessions



Your Optimizing Program Design Cohort!



Community Standards

- **Stay engaged:** We'll be spending an intensive, albeit brief period of time together. It's important that folks take care of their individual needs so that they can stay actively engaged in the entirety of the discussion. Please refrain from being on your phone or computer, unless using to take notes. When virtual, please try to limit other activities.
- **Listen to understand:** As opposed to listening to respond, where we wait for someone to stop speaking so we might speak, listening to understand invites us to actively take in what our peers are saying and ask follow-up questions to ensure we understand not just what a person says, but what they mean.
- **Take space, make space:** If you're someone who is typically comfortable speaking in group settings, consider paying attention to when and how frequently you share, giving space to those voices the group might hear from less frequently. If you're someone who is typically quieter in group settings, consider taking a chance and sharing your questions, thoughts, concerns, and opinions.
- **Nobody knows everything, but together we know a lot:** Everyone has expertise to contribute whether it be skills, resources, stories or insights. Our collective knowledge far exceeds our individual contributions.
- **Challenge assumptions:** We're here to learn from one another and that means asking difficult questions and challenging what we may assume to be best practice. Many of our assumptions are invisible in our culture and ways of working. How might we get curious about the things we assume to be true to explore if there are ways to innovate and evolve our practices?
- **Expect and accept non-closure:** During our limited time together we will not be able to address and solve all open question. That's ok! Prepare yourself in advance that decisions may remain under discussion, questions may remain open and we simply may not have time to address some topics. This is part of an ongoing conversation and there's more to follow.
- **Center Participant Workers:** Participant Workers are the heart of our work. Keep the resident experiences, perspectives, needs and desires front and center in all things
- **Embrace Diversity in All of its Forms:** Acknowledge and value the diversity of perspectives and opinions within the group, specifically how they may be informed by folks lived vs. learned experiences.
- **Create a Safer Space for Sharing / Refrain from Attribution:** We want people to feel comfortable sharing experiences, observations, and ideas - even if those are ideas aren't yet fully baked. Let's help people be vulnerable and feel comfortable sharing by not attributing specifics.
- **Understand The Difference Between Intent & Impact:** Try to understand and acknowledge impact. Denying the impact of something said by focusing on intent is often more destructive than the initial interaction.



THE WHY: ESEs are key to building economic power & economic mobility

Our Working Definition

Economic power is the access, knowledge, resources, and freedom to build wealth and exercise control over one's life and well-being

Key Drivers	Dignified Work	Sound Financial Resources	Quality Standard of Living
How Each Driver Advances Economic Power	<p>Building wealth</p> <p>Participating in dignified work allows those who have faced barriers to employment to receive a predictable and family sustaining income</p> <p>Control over one’s life and well-being</p> <p>Participating in dignified work offers opportunities for career advancement, predictable hours, PTO, benefits, voice in the workplace, and freedom from harassment</p>	<p>Building wealth</p> <p>Access and knowledge of how to use sound financial services allows individuals to participate in formal wealth-building services, including savings and investment accounts</p> <p>Control over one’s life and well-being</p> <p>Access and knowledge of how to use sound financial services allows individuals to adequately prepare for and withstand economic shock and plan for important purchases</p>	<p>Building wealth</p> <p>Having a quality standard of living, including living in a stable, affordable, healthy, and safe environment, enables individuals to engage fully in wealth-building activities</p> <p>Control over one’s life and well-being</p> <p>Having a quality standard of living provides the financial freedom, in-demand skills, and access to social resources that empower individuals to reduce stress, improve health, & make informed decisions about their lives</p>



Introductions



Hillary Frances
Founder
Flying Whale



Jamie Stark
Manager
Relationship Manager



Stephanie Chiu
Sr. Associate
Government Partnerships & Policy

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SESSION OBJECTIVES:

- ☐ Build peer connections
- ☐ Identify the elements of a logic model project that will require the most time to develop but will catalyze program growth.
- ☐ Create space for raising questions, but be comfortable with not be able to resolve all questions today

How are we Going to Accomplish These Objectives?

1. Introductions of you all!
2. Improve the clarity and boldness of your long term impact.
3. Identify aspirational outcomes based on your largest categories of work.
4. Clarify the use of outputs.
5. Engage in a case study with an ESE guest.
6. Commit to what is next for you based on learnings from this session

**Please type your name,
organization, and how useful is
your current logic model on a
scale of 1 to 5**

1 - Not useful or don't have one
5 - Very useful





**Let's get into
it!**

Today's Punchline

Logic models help program leadership visualize the way all of your employment activity works together to transform lives.

Today's Critical Thinking

To identify the elements of a logic model project that will require the most time to develop but will catalyze program growth.

Logic Model: Why?

- Your program leadership can visualize the way in which all of your employment activity works together to transform lives. It will read as a map that connects the dots between activities and outcomes.
- It will de-silo your programs.
- It will tell the story of your organization's impact as a whole.

Logic Model: What?

- A big picture plan for the work of your programs as a whole.
- The correlation between daily activities and the intended impact of those activities.

**FOCUS
POPULATION**

Describes the resources needed to execute your activities (financial, talent, tools, etc.)

ACTIVITIES

List the elements of your day to day program that are in place to achieve your goals. Your interventions designed to create change.

List them

List them

List them

OUTPUTS

List the measures that you count as a direct result of these activities.

List them

List them

OUTCOMES

OUTCOME GOAL 1:

Description and how it's measured

OUTCOME GOAL 2:

Description and how it's measured

OUTCOME GOAL 3:

Description and how it's measured

**IMPACT/
VISION**

The ultimate aim of your work; the answer to the question “what would the world look like if you achieved your grandest ambition?”

FOCUS POPULATION

Survivors of human
trafficking

ACTIVITIES (samples)

WORK

- 18- 24 months of paid training and work experience in a social enterprise
- Workshops designed to improve power skills and workforce readiness

MONEY

- Financial literacy workshops
- One-on-one coaching for financial self-sufficiency
- Offering savings match incentives for reaching financial milestones

HOUSING

- Connect survivors with temporary or long-term stable housing
- Provide emergency financial rental assistance and utilities
- Provide tiered rental assistance

RELATIONSHIPS

- Facilitate social outings
- Host weekly luncheons
- Match survivors with community-based mentors

HEALTH

- Provide access to onsite trauma counseling
- Facilitate peer-based recovery support

OUTPUTS (samples)

WORK

- # who are working
- Average hourly wage
- # who have received shadowing or internship opportunities
- Job retention rate
- # with reliable transportation

MONEY

- Average financial assistance offered to individuals
- % of people reaching or identifying self-sufficiency

HOUSING

- # who secure safe housing

RELATIONSHIPS

- # of people who attend outings
- # of people with mentors
- # of hours spent with mentor

HEALTH

- # of referrals to health or mental health care

OUTCOMES

WORK

By 2026, 85% of the individuals we serve will increase their earning power.

MONEY

By 2026, 85% of the individuals we serve have improved their financial self-sufficiency.

HOUSING

By 2026, 80% of people feel safe and stable in their current housing.

RELATIONSHIPS

By 2026, 70% of the individuals we serve will increase their social capital.

HEALTH

By 2026, 60% of participants will be able to engage in work and family activities without being hindered by physical and mental health.

IMPACT/ VISION

Survivors are no longer
alienated by past
exploitation but in demand
for their talent in our cities.



An investment that works.

Case Study: Freedom a la Cart



café + bakery + catering

Pause.

Historically, logic models were a tool of paternalism.

Reflect.

How can I use a logic model to lead toward liberation?



Skill #1 Improve the clarity and boldness of your impact statement

Impact Statement

A summary of what it looks like if you knock it out of the park on your mission within your organization's lifetime.

Impact Statement

There is a correlation between bold impact statements and **donor** engagement.

Is there a correlation between bold impact statements and **staff** engagement?

Impact Statement

Examples

- **Neighborhood Industries:** Community ownership will replace community poverty within neighborhood economies in California.
- **Working Fields:** Make stable employment possible for anyone in our community, no matter the systemic or personal barriers they may face.
- **Sister Hearts:** A decarceration program to accompany every institution that incarcerates.
- **CoBuild:** Youth who lived in affordable housing will run the companies that build the homes the next generation can afford and be proud of.
- **EMERGE Connecticut:** We will remove the shame of incarceration within our lifetime.
- **Better Futures:** Better Futures Minnesota will end the negative impacts of unemployment and underemployment for justice involved individuals.

Impact Statement

Clarity:

- You can picture the way the landscape has changed because of your work.

Ex: We say “people are paying for their kids education” versus “people are thriving.”

Boldness:

- The landscape has changed in a definitive way.

Ex: We say “College graduates across Los Angeles are equipped to pay for their kids education” versus “the people we serve”

Pause.

Where do I feel resistance?

Reflect.

What part of *bold* and *clear* am I attracted to?



Skill #2 Identify aspirational
outcomes based on your
largest categories of
work.

Outcomes

The bite sized pieces you're taking out of the impact statement within a short term period of time (3-5 years). The quality of the impact.

Outcomes

Buckets of Work

Start by organizing your work into the largest buckets or categories you have. Your work can be organized into categories.

Examples:

- Individuals, businesses, communities
- Economic health, mental health, physical health
- People and policy

Outcomes

Examples

- By 2026, 95% of program participants will recreate themselves measured by indicators of personal identity development.
- By 2026, 68% of formerly incarcerated individuals completing our program will return to serve and mentor others.
- By 2026, we will provide decarceration programming in 10 additional prisons.
- By 2026, 85% of the individuals we employ will demonstrate economic mobility.
- By 2026, 85% of the individuals we serve will increase earning power.
- By 2026, 85% of the individuals we serve will exit cycles of poverty.

Skill #3 Clarify the use of outputs.

Outputs

A list of metrics that measure the churn of our activities, the quantity of your work.

Outputs vs Outcomes

Outputs communicate how *busy* you've been.

Outcomes communicate how *effective* you've been.

Outputs vs Outcomes

Outputs communicate how *busy* you've been.

Outcomes communicate how *effective* you've been.

Outputs vs Outcomes

Case Study. Freedom a la Cart

Outcomes

WORK

By 2026, 85% of the individuals we serve will increase their earning power.

MONEY

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HOUSING

By 2026, 80% of people feel safe and stable in their current housing.

RELATIONSHIPS

By 2026, 70% of the individuals we serve will increase their social capital.

HEALTH

By 2026, 60% of participants will be able to engage in work and family activities without being hindered by physical and mental health.

Outputs

- Number of people served across programs and within each program
- Retention rate across program and per program
- Number of graduates across programs and within each program
- Job retention rate

Finally: Using your logic model

- Set quarterly review meetings to look at the logic model.
- Review quarterly data on outputs and outcomes.
- Discuss how to pivot programming accordingly.



Your Turn

Breakout

- Share a question you have about logic models with your partner.
- Co-create an answer.
- Switch.

Discuss the type of logic model that you would use to manage your program. How might it differ from those you've had before?

Finally: Please reflect

Which section of your logic model project will require the most time to develop?

Which section of your logic model will answer a question you have had about your programs?

Which section of your logic model will be the most controversial?

Which section of your logic model do you want to work on next?



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SESSION IN REVIEW:

- ✓ Build peer connections
- ✓ Identify the elements of a logic model project that will require the most time to develop but will catalyze program growth.
- ✓ Create space for raising questions, but be comfortable with not being able to resolve all questions today

Commitments

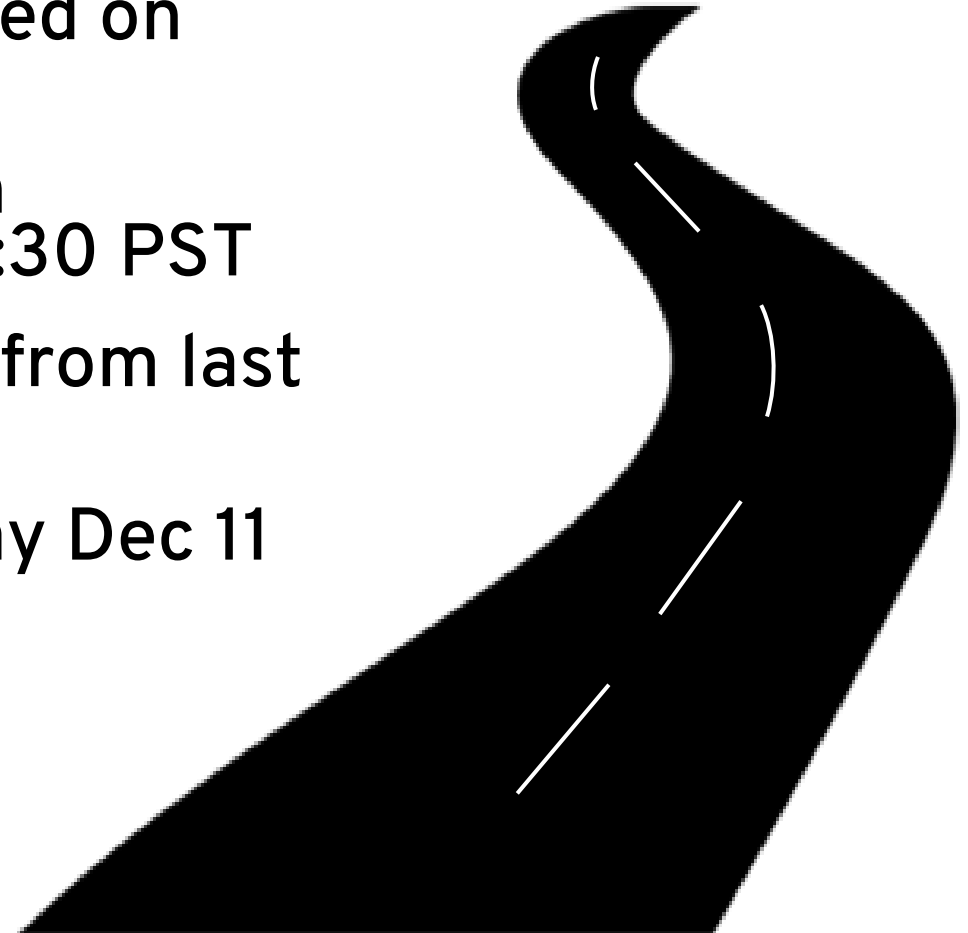


Based on everything you learned today what is 1 to 2 commitments you can make? For example:

- Improve the clarity and boldness of my long term impact.
- Identify aspirational outcomes based on my largest categories of work.
- Clarify the use of my outputs.

What's next?

- Additional resources will be posted on REDFWorkshop
- Coaching hours will be hosted on Wednesday Nov 13 from 11am-12:30 PST
- Make progress on commitments from last slide!
- Next cohort session is Wednesday Dec 11 from 11am-12:30pm PST



Feedback Survey

Please take a few minutes to fill out our Survey on this session. We will also be collecting the SMART goal you developed in this survey.

<https://bit.ly/EMTOptimizeAll>

This feedback helps us improve your experience and plan adjustments to make moving forward.





Thank you!