

Logic Model to Evaluation Plan

PURPOSE

This guide is a companion to BSRI's Logic Model Basics resource. It picks up where that guide leaves off: once a logic model is complete, this document walks through how to turn it into an evaluation plan your organization can actually use.

An evaluation plan does not require building a new data system from scratch. In most cases, the outputs and outcomes in your logic model already point you toward the data you need. This guide shows you how to make that translation, step by step.

Use Case

- ▶ You have a completed logic model and are ready to build an evaluation plan.
- ▶ You need to define what data you will collect to show funders and partners that your program is working.
- ▶ You want to track progress but are not sure how to connect your activities and outcomes to measurable indicators.
- ▶ You are building or updating evaluation tools and need a practical starting point.
- ▶ You want a process your team can use without needing a dedicated evaluator on staff.



ABOUT BSRI

BSRI was created to support informed and effective decision-making for our partners with tools, resources, and data for action. As we wind down operations, we are creating these resources for the community to continue the work. We use our guiding principles in engaging with partners and communities, putting people first through accountability and reciprocity, communicating transparently, and sharing our knowledge widely.

ABOUT THIS DOCUMENT

This guide is based on BSRI's experience helping nonprofit and social impact organizations build evaluation plans that are practical, grounded, and connected to their programs as they actually run. We use the same running example from Logic Model Basics (a community health outreach program) throughout, so you can see how the logic model developed in that guide becomes an evaluation plan here.

If you have not yet built your logic model, start with Logic Model Basics before using this guide.

USE OF ARTIFICIAL INTELLIGENCE (AI)

Our organization utilizes artificial intelligence (AI) tools to enhance efficiency, support data analysis, and strengthen evaluation practices. We also encourage our partners and clients to thoughtfully explore AI as a means to build future-ready evaluation capacity. All AI use is governed by strict data privacy and ethical standards. We do not input any personally identifiable information (PII), protected health information (PHI), or other sensitive data into AI systems in a manner that would violate HIPAA or other applicable privacy regulations.

Additionally, we exclusively use licensed AI tools and platforms that explicitly prohibit the use of submitted data for model training or retention beyond the scope of the intended task. This ensures that all information remains confidential, secure, and protected.

WHAT IS AN EVALUATION PLAN?

An evaluation plan is a written document that describes how you will monitor and evaluate your program and how you intend to use what you learn. The Centers for Disease Control and Prevention (CDC) describes it this way:



Definition

"An evaluation plan is a written document that describes how you will monitor and evaluate your program, as well as how you intend to use evaluation results for program improvement and decision making. The evaluation plan clarifies how you will describe the 'What,' the 'How,' and the 'Why It Matters' for your program." ([CDC, 2011](#))

An evaluation plan is not a research study. It does not require a control group, a survey instrument, or a statistician. It is a practical document that answers three questions:

1. What did we do? or What do we plan to do? (Outputs: the countable results of your activities)
2. What changed because of it? or What do we think will change as a result? (Outcomes: the changes your program worked toward)
3. How do we know? or How will we know? (Sources of information: where the data comes from)

A logic model already contains most of the answers. The evaluation plan is how you turn those answers into data.

FROM LOGIC MODEL TO EVALUATION PLAN

The move from a logic model to an evaluation plan is a translation, not a redesign. Your outcomes become objectives: the things you are setting out to evaluate. Your outputs carry over unchanged. The evaluation plan adds evaluation questions for each and identifies where the data to answer them will come from.



If your outcomes tell you what you are trying to achieve, then your evaluation plan tells you how you will know whether you got there.

As mentioned above, we use the same community health outreach program from Logic Model Basics. Here is a reminder of what that logic model contains:

Resources	Activities	Outputs	Outcomes	Impact
What you need to run the program	What your team does to deliver the program	The direct, countable results of your activities	The changes you expect to see as a result	The long-term change you are working toward
Examples				
▶ Outreach staff ▶ HIV test kits ▶ Tablets and data systems ▶ Transportation ▶ Funding for incentives ▶ Partner organization relationships ▶ Social media accounts ▶ Evaluation support	▶ Daily community outreach and recruitment ▶ HIV and substance use screenings ▶ Ambassador recruitment and training ▶ Resource list development ▶ Individual linkage to services ▶ Community events and workshops ▶ Social media campaigns	▶ # of people screened ▶ # of screenings with positive results ▶ # of referrals made ▶ # of events held ▶ # of event attendees ▶ # of training sessions completed ▶ # of social media posts published	▶ More people connected to care ▶ Increased knowledge of available services ▶ Stronger community partnerships ▶ Reduced stigma around seeking services	▶ A community free of stigma around HIV, mental health, and substance use ▶ Individuals who can navigate their own care ▶ A stronger, more equitable local health system
IF resources and activities are in place >> THEN outputs are produced >> THEN outcomes are achieved >> THEN impact is advanced				

We will build the evaluation plan from the outcomes and outputs in this logic model. Notice that the example is intentionally simplified -- a real program would have more activities, more specific outputs, and a fuller set of outcomes. The goal here is to show the process clearly, not to be exhaustive.

Like the logic model, the evaluation plan reads left to right. The IF/THEN logic continues:

Objectives (Carried over from your LM outcomes)	Evaluation Questions (Did we achieve it? How do we know?)	Outputs (Carried over from your LM)	Source of Information (Where does the data come from?)
What changes are you working toward?	How will you know whether that change happened?	What did you produce? Did you hit your targets?	What report, form, or tool will give you the data?
▶ Increased number of people connected to care ▶ Increased knowledge of services ▶ Stronger community partnerships ▶ Reduced stigma	▶ Did the number of people linked to services increase? ▶ Did participants report increased knowledge after attending events? ▶ What were the accomplishments or barriers in partnership outreach?	▶ # of referrals made ▶ # of events held / # of attendees ▶ # of screening sessions ▶ # of social media posts	▶ Monthly program report ▶ Client tracking spreadsheet ▶ Staff check-ins or meeting notes ▶ Brief participant feedback

IF your outcomes tell you what you are trying to achieve,>> THEN your evaluation plan tells you how you will know whether you got there



Start here if you have not build a logic model

Start with the BSRI resource **Logic Model Basics** found on the Impact Hub . This guide assumes you have a completed logic model with outputs and outcomes defined. The evaluation plan will only be as strong as the logic model it is built from.

The Four Columns of an Evaluation Plan

A basic evaluation plan has four columns. Each one answers a different question about how your program will be evaluated.



Objectives (“Why it Matters”)

Your objectives come from your logic model outcomes. They are the changes your program is working toward and the reason the evaluation matters. Pull outcome language directly from your logic model, with minor rewording if needed to make each objective specific enough to evaluate.





Evaluation Questions (“Why it Matters”)

Evaluation questions turn each objective and output into something answerable. For every objective and output, you need at least one question that can be answered with data you can actually collect.



Outputs (“What”)

Your outputs come directly from your logic model, unchanged. This column is your accountability layer -- it shows whether the program was implemented as planned.



Source of Information (“How”)

For each evaluation question, you need a specific source -- a report, a spreadsheet, a form, a staff check-in -- that provides the data to answer it. This is where the plan becomes operational.



A note on Objectives vs. Outcomes

The objectives column looks a lot like the outcomes column in your logic model, because it is. Outcomes from the logic model become the objectives of the evaluation. You may tighten the language slightly to make each objective clearer or more measurable, but the substance should stay the same.

Writing Evaluation Questions

Evaluation questions are how you turn an objective or output into a measurable question. If your logic model is the story, the evaluation plan is the proof. A good evaluation question is specific, tied directly to your logic model, and answerable with data you can realistically collect.

Too Broad

“Did the program improve community health?”

Answerable

“Did participants report increased knowledge after attending a community event?”

Most evaluation questions follow one of a small number of patterns. Notice that some questions ask about numbers and counts, while others ask about experiences, accomplishments, and barriers. Both matter -- numbers tell you whether targets were met, while narrative questions help you understand how and why.

Question Formula	Example (from our running example)
Did [your organization] complete [activity] ? How many [people / events / sessions] ?	Did the program hold community events this quarter? How many people attended?
Did [your organization] reach its target for [output] ?	Did the program screen its target number of people for HIV and substance use?
Did [population] experience [change] as a result of [activity or program] ?	Did participants report increased knowledge of available services after attending a community event?
Did [your organization] achieve [outcome] over the reporting period?	Did the number of people connected to care increase compared to the prior period?
What were the accomplishments or barriers in [activity] ?	What did outreach staff find most effective -- or most challenging -- in the community this month?
What did [participants / staff / partners] learn or experience as a result of [activity] ?	What did participants say about whether events felt welcoming and relevant to their needs?



Keep it Answerable

The most common mistake is making evaluation questions too broad. "Did the program improve community health?" is not an answerable evaluation question; it is an aspiration. "Did participants report increased knowledge of available services after attending a community event?" is answerable.

You do not need to answer every possible question about your program. Focus on what is most important to your team, your funders, and the community you serve, and that you can realistically answer with the data you have or can collect.

Identifying Sources of Information

The source of information column is where evaluation plans most often stall. Organizations know what they want to measure, but assume they need to build entirely new data systems. In most cases, that is not true.

Start with what already exists. Monthly reports, intake forms, tracking spreadsheets, and staff check-ins are often already capturing some of the data you need. Before creating anything new, take stock of what you have.

Status	Type of Source	Notes
Already exists	Monthly or quarterly reports that your organization already submits	Often, the best starting point is to check what fields are already captured.
Already exists	Intake forms, screening records, or client tracking spreadsheets	Review what is already documented before building anything new.
Already exists	Regular staff check-ins or team meetings	Add two or three consistent questions to turn these into a data source.
Needs to be created	A simple tracking spreadsheet for a specific activity	Keep it minimal: an ID or name, a date, and a few key fields is often enough.
Needs to be created	A brief question added to an existing intake or follow-up form	One or two questions added to something participants already complete is low burden.
Needs to be created	A structured outreach log	Where did outreach happen? How many contacts? What messages were used?



Simple is Better

The best data source is the one people will actually use. Review the sources column with the staff responsible for collecting data before finalizing the plan. If a source feels burdensome, it will not be used consistently. A short spreadsheet that gets updated regularly is more valuable than a comprehensive system that does not.



Flag What Still Needs to Be Built

The best data source is the one people will actually use. Review the sources column with the staff responsible for collecting data before finalizing the plan. If a source feels burdensome, it will not be used consistently. A short spreadsheet that gets updated regularly is more valuable than a comprehensive system that does not.

A SAMPLE EVALUATION PLAN

Here is a completed evaluation plan built from our running example. Read it left to right. The objectives come from the logic model outcomes. The outputs carry over unchanged. The evaluation questions follow the patterns above. The sources of information are specific and realistic.

Thought Prompt when creating an evaluation plan: **Does the evaluation plan reflect how your team actually tracks progress — and do you see how it can be used when reporting outcomes to or presenting impact?"**

Objectives ("Why It Matters")	Evaluation Questions ("Why It Matters")	Outputs ("What")	Source of Information ("How")
Increased number of people connected to care	Did the number of people linked to services increase compared to the prior period? What were the accomplishments or barriers in linking people to services?	# of referrals made # of people linked to services	Monthly program report (referrals column) Client tracking spreadsheet Staff check-in notes
Increased knowledge of available services	Did participants report increased knowledge of available services after engaging with the program? What types of information did participants find most useful?	# of events held # of attendees # of social media posts # of impressions	Monthly program report (events tab) Social media analytics Brief participant feedback (optional)

Objectives ("Why It Matters")	Evaluation Questions ("Why It Matters")	Outputs ("What")	Source of Information ("How")
Stronger community partnerships	Did the number of active partner organizations grow over the reporting period? What were the accomplishments or barriers in building or maintaining partnerships?	# of partner organizations (new and continuing) # of community meetings attended	Partner tracking list Staff check-ins or meeting notes
Reduced stigma around seeking services	Did participants report feeling more comfortable seeking care after engaging with the program? What did community members say about how they perceive care-seeking?	# of people screened # of training sessions completed # of ambassadors trained	Screening records / monthly report Ambassador tracking spreadsheet Brief intake question added to existing form



A Few Things to Notice

Some outputs appear under more than one objective. That is fine. A single output can help answer more than one evaluation question.

Some sources of information are things the program may not have yet. In a real evaluation plan, those would be flagged as tools to build before the program begins.

The questions about accomplishments and barriers are just as important as the questions about numbers. They are what allow a team to learn and improve, not just report.

HOW TO BUILD YOUR EVALUATION PLAN

Here is the sequence we follow when building an evaluation plan:

- **Step 1: Pull your outcomes into the objectives column** - Copy and paste your logic model outcomes from the logic model into the evaluation plan. Review each one to ensure it is specific enough to ask an evaluation question about. Tighten the language if needed, but do not change the substance.

- ▶ **Step 2: Pull your outputs into the outputs column** - Copy and paste your logic model outputs directly. If any output is not countable or trackable, revise it now.
- ▶ **Step 3: Write evaluation questions for each objective and output** - Use the formulas in this guide. Aim for at least one question per objective and one per output. Include at least a few questions about accomplishments and barriers. If you get stuck, ask other collaborators (staff, clients, funders) what they want to know about a specific objective.
- ▶ **Step 4: Identify sources of information** - For each question, identify the most practical source. Start with what already exists. For anything that needs to be created, keep it simple and assign it to someone. Keep in mind you may be collecting the information, but it may need to be digitized (e.g., a paper intake form that needs to be entered into a spreadsheet).
- ▶ **Step 5: Review with your team** - Go through the plan with the staff who will collect the data. Make sure every source is realistic, responsibilities are clear, and the frequency for data collection and entry is defined.



? What Will You Do with the Data?

An evaluation plan is only useful if the data is used. Before you finalize it, decide how and when you will review findings (e.g., monthly for outputs, quarterly for outcomes)? Who will be in the room?

The best evaluation plans are built into how an organization already operates, not treated as a separate reporting obligation.

Appendix A.

Blank Evaluation Plan Template

Use this template to build your own evaluation plan. Start by pulling your objectives from your logic model outcomes and your outputs from your logic model, then write evaluation questions and identify sources of information for each.

Objectives ("Why It Matters")	Evaluation Questions ("Why It Matters")	Outputs ("What")	Source of Information ("How")

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Appendix B.

BSRI Evaluation Plan Checklist

A quick tool for reviewing whether your evaluation plan is complete and ready to use.

How to use: Read through each item, check what is already strong, and use the notes column to identify what needs to be clarified, added, or revised.

☒	Checklist Item	Review Question	Guiding Thoughts	Notes
	Logic model is final	Is your logic model complete and agreed on by your team?	Do not build an evaluation plan from a draft. If the logic model changes, the evaluation plan will need to change too.	
	Objectives identified	Have you pulled your outcomes into the objectives column?	Outcomes become objectives. Tighten the language if needed, but do not change the substance.	
	Outputs carried over	Have you pulled your outputs into the outputs column?	If an output is not trackable, revise it now. Every output should be something you can actually measure.	
	Evaluation questions written	Does each objective and output have at least one evaluation question?	Use the formulas in this guide. Each question should be answerable with data you can realistically collect.	
	Narrative questions included	Have you included at least a few questions about accomplishments and barriers?	Questions about what went well and what was challenging round out the picture that numbers alone cannot provide.	

☒	Checklist Item	Review Question	Guiding Thoughts	Notes
	Sources of information identified	Does each evaluation question have a source of information?	Start with what already exists. Only build new data collection tools when nothing adequate is in place.	
	Sources are realistic	Are your data sources things you can actually use?	If a source requires significant new staff time or technology, simplify. The best source is the one that gets used.	
	Responsibilities are clear	Does someone own each data source?	Assign each source to a specific person or role. Evaluation plans fail when no one knows who is responsible.	
	Frequency is defined	How often will data be collected for each source?	Monthly, quarterly, annually -- specify it and make sure it is realistic given staff capacity.	