Linking the 5-year plan, logic model and annual work plan

There are three primary program planning tools – the 5–year State plan, the logic model, and the annual work plan. This document will review each tool and describe how they are related; provide suggestions on how to visually link each tool; and provide information on why linking them is beneficial to the DD Council. Program planning is the foundation of solid evaluation because it determines what objectives a DD Council intends to accomplish, determines how the objectives will be accomplished, and provides ways to measure the accomplishment.

Descriptions:

The 5-year State plan describes the current state of services and supports for people with developmental disabilities and their families, identifies gaps in services, and outlines five –year goals, strategies to achieve the goals, and serves as a "blueprint" to move the DD Council forward to new accomplishments.

A logic model is a diagram (picture) that shows the relationship between DD Council components and activities, and desired outcomes. It is a visual representation of how a DD Council will use its resources or inputs to accomplish the 5-year goals.

A work plan is a concise easy-to-read overview of DD Council goals, objectives, activities, outputs and outcomes, evaluation, and targeted performance measures. It is a detailed "road map" for implementing the DD Council program for a given one year budget period.

Similarities and Differences Between a 5-Year Strategic Plan, Logic Model, and Work plan

There is some overlap between the 5-year plan, logic model, and work plan, and the differences are important. The 5-year plan describes the goals, objectives, and expected outcomes a DD Council has planned to achieve its five-year goals. The logic model illustrates the presumed effects of implementing the strategies described in the 5-year plan. The work plan is the DD Council's guide to implementing the 5-year State plan activities on a yearly basis. The 5-year plan and logic model both give an overarching 5-year view of the DD Council activities and expected outcomes. The work plan walks the user through the specific, annual program objectives, and provides an outline of key activities to implement the 5-year plan activities for a specific time period.

Table 1 shows how the 5-year State plan and the 5-year logic model relate to each other and to the annual work plan. For example, a *5-year State plan* goal may be: "Super Council" will support efforts to increase the organizational capacity of self-advocacy organization led by and for individuals with DD".

The *logic model* would reflect this goal as a long-term outcome "increased grassroots advocacy organizing activities that resulted in measurable systems change". You might have an objective to reach this goal such as "provide funding to support the development of effective grassroots advocacy efforts", and this would be represented in the logic model in the strategies/activities column.

The *yearly work plan* would include objectives and corresponding activities, expected outputs and outcomes, and the data evaluation and measurement tasks for each objective. In addition, the targeted performance measures indicated in the work plan are reflected in the logic model as a short-term or intermediate outcome. Table 1 shows how the three tools are related. Together, these tools can help with planning, implementing, and monitoring the DD Council 5 year state plan.

Need for alignment and linkage

A logic model helps guide the work by charting a road map for your work. Because the logic model reflects the DD Council work, it is important that the logic model align with the 5-year plan goals, and strategies/activities that are identified in the plan.

In turn, the 5-year strategic plan and logic model should guide the objectives and activities for implementing strategies/activities selected and described in the annual work plan.

To ensure their usefulness as planning tools, periodically review and compare the 5-year plan, logic model, and work plan, especially when writing your annual work plan(s).

Developing, linking, and using all three planning tools will help the DD Council remain on target and reach its goals.

Table 1

5-Year State plan components	Logic Model Components	Annual Work plan Components
5-year DD Council goals	Long-term outcomes	5-Year DD Council goals
Not applicable	Activities	Key activities
Rationale for goals/activities	Logical links between activities and intended outcomes	Not applicable
Not applicable	Outputs and short term, intermediate, and long-term outcomes	Key activities
Expected outcomes	Short-term and intermediate outcomes	Targeted performance measures

Resource: Centers for Disease Control and Prevention. Program Performance and Evaluation Office: Logic Models - https://www.cdc.gov/eval/logicmodels/index.htm