



**Outcome-Based Evaluation  
An Introduction  
August 2010 Webinar**

**Developed for:  
The New York State Library  
Division of Library Development**

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Text of narration:

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# Welcome



- **Amanda R. Latreille,**  
Certified OBE Trainer, AmaLat Consulting
- **This webinar is an introduction to OBE—more in depth OBE resources will be shared at the end of the presentation**



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Text of narration:

Welcome! Thank you for joining me. My name is Amanda Latreille. I am an independent consultant and Certified Outcome-Based Evaluation (or OBE) Trainer. I have worked with many libraries across New York State in successfully implementing OBE to plan and evaluate library programs and services. This, however, is the first time that I have been able to present OBE in a webinar format. I would like to thank Elizabeth Carrature for her assistance with the presentation, and I hope you find it useful.

Before we jump into the content, it is important you understand that this presentation is only an introduction to OBE. The New York State Library has traditionally offered 2-day workshops on OBE to fully cover and practice the many aspects of OBE and the OBE logic model. Alternatively, this webinar will cover the very basics to help you get started. The webinar is a good fit for people who are brand new to OBE or who need a quick refresher. Links to OBE resources are posted at the end of this presentation, including a link to the New York State Library's OBE page with information about workshops.



## Content

- **We will cover:**
  - **The definition of OBE**
  - **The many benefits of using OBE in planning and evaluating library programs and services**
  - **How to write basic, measurable outcomes with data sources and target achievement levels**
  - **The difference between outcomes and outputs**



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Text of narration:

In this webinar, we will cover the following:

- The definition of OBE
- The many benefits of using OBE in planning and evaluating library programs and services
- How to write basic, measurable outcomes with data sources and target achievement levels
- The difference between outcomes and outputs

Because OBE is often best understood through real-world examples, I have included two very different library projects that we'll work through together.

## What is OBE?

- A systematic approach
- Determines if a program has achieved the desired results
- Answers the questions:
  - Was the program a success?
  - What impact did it have?



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Text of narration:

OBE is a systematic approach. It's a step-by-step method of determining if your program has achieved the desired results. For example, you hold a class for the public on how to use a specific genealogy database. You intend for participants to walk away able to effectively access and search the database on their own. OBE allows you to measure whether or not your class was successful and its impact. When you think of OBE, think of impact.



## Outcomes

- Are the desired results
- Must be predictable and measurable
- In OBE, an outcome is defined as:
  - A change in the target audience
  - Could be a change (an improvement) in skills, knowledge, attitudes, behaviors, status, or life condition

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Text of narration:

As you would expect, outcomes are the foundation of OBE. They are the glue that holds the entire approach together. You write your outcomes as you are planning your project. They are the desired results. They must be predictable and measurable.

In OBE, an outcome has a very specific definition: a change (or an improvement) in the target audience. This could be a change in skills, knowledge, attitudes, behaviors, status, or life condition. In the case of the genealogy database class, you may use this outcome: participants demonstrate effective genealogy database searching.



## Program

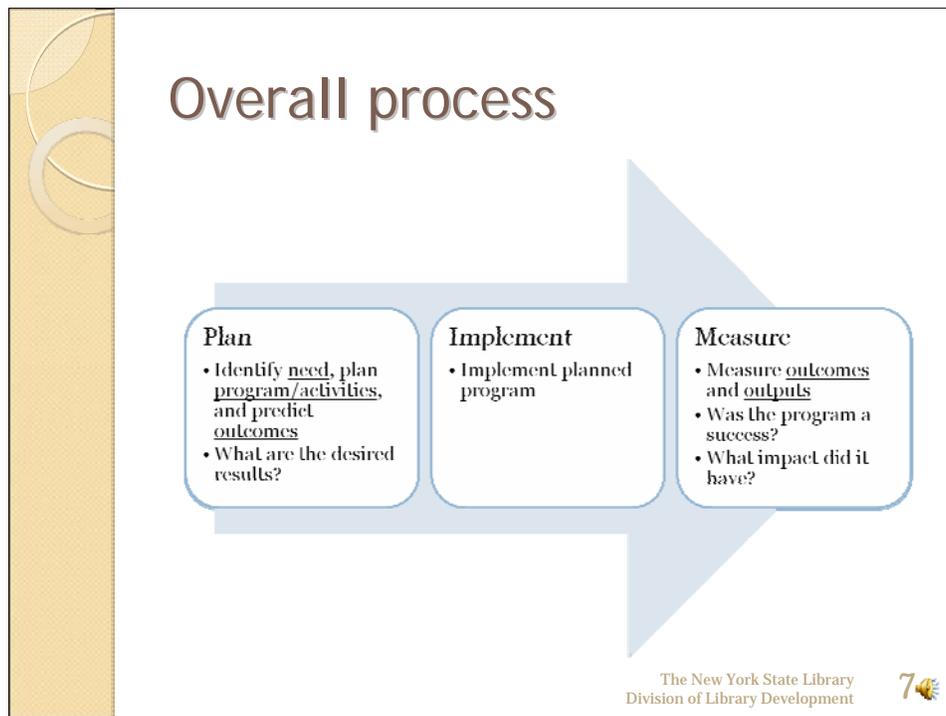
- **In OBE, a program is defined as:**
  - A project or activities intended to produce the desired results (outcomes)
  - Designed to change skills, knowledge, attitudes, behaviors, status, or life condition
  - Has a beginning and end

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Text of narration:

Another important OBE definition to know is that for “program.” In OBE, the program is simply your project. It is a set of activities intended to produce the desired results or outcomes. It must be designed to change the target audience in some way (skills, knowledge, attitudes, behaviors, status, or life condition). The program has a beginning and an end. In our example, the genealogy database class is the program. Activities for this program may include curriculum development, scheduling, promotion, evaluation, etc.



Text of narration:

Overall process. For the visual learners out there, I created this flow chart. In a nutshell, OBE involves planning your program and outcomes based on a need, then implementing the program, and finally measuring these outcomes and outputs (which I'll talk about a bit later) to determine the impact of your program.

## A basic example

- **Need**: Unemployment is increasing in the community due to factory closures
- **Program**: The public library director wants to hold a job fair



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Text of narration:

Now, let's walk through a basic example. Before you start any new program, you must always have a need. Make sure it is clearly defined and well researched. This is the first thing that the grant reviewer reads, and it can really set your proposal apart from the get go—good or bad.

In this example, the community has experienced several factory closures in recent months. There is suddenly an influx of people without work. More and more job seekers are coming into the public library for assistance with online job searching and resume writing. The library director has decided to hold a job fair to meet this target audience's specific needs. In this case, the job fair is the program.

## A basic example (continued)

- **Activities:** Library staff will assist with online job searching and resume writing, related resources will be displayed, and local organizations and businesses will be invited to participate
- **Target audience:** Job seekers (200 participants expected)



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Text of narration:

Job fair activities include online job searching and resume writing assistance, job and education resource displays, and local organization and business exhibits. This is a short list for the purposes of this webinar. If you were putting this together in the real world, you would want to be more specific. Think of the activities as a work plan that includes the tasks, person(s) responsible for completing the tasks, dates by which the tasks will be completed, etc. The target audience is local job seekers with an expected job fair turnout of 200.

## A basic example (continued)

- The director has asked a local community foundation for a grant to fund the job fair
- The grant application requires OBE
  - Can you write 3 outcomes for the event?
  - Remember that outcomes must be predictable, measurable, and indicate change in the target audience



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Text of narration:

To fund the job fair, the library director has asked a local community foundation for a small grant. The application requires OBE. This is not unusual, even for a relatively small amount of money. More and more grant makers are requiring OBE. They want to know that their money is making a difference.

So can you come up with three outcomes for the job fair? As you write them, remember this checklist:

- Must be predictable
- Must be measurable
- Must indicate change in the target audience

## A basic example (continued)

- **Possible outcomes:**
  - Participants rate the job fair highly
  - Participants report they learned about at least one job or education resource that they plan to use
  - Participants view the library as a source for job and education information



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Text of narration:

Here are three possible outcomes. There are others that you could use, but we'll focus on these:

- Participants rate the job fair highly.
- Participants report they learned about at least one job or education resource that they plan to use.
- Participants view the library as a source for job and education information.

They are predictable, measurable, and indicate a change in the target audience. You are going to hear me say this checklist again and again, but that is because it's perhaps the most important thing we'll cover.



## A basic example (continued)

- **Adding data source and target achievement level:**
  - Participants rate the job fair highly (measured by participant survey with target of 160 or 80%)
  - Participants report they learned about at least one job or education resource that they plan to use (measured by participant survey with target of 120 or 60%)
  - Participants view the library as a source for job and education information (measured by participant survey with target of 160 or 80%)

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Text of narration:

Now, we need to add the data source and target achievement level to the outcome statements. When creating an OBE logic model, outcomes have several detailed parts. As this is an introduction to OBE, we are going to include just two.

The data source is the place where you obtain your information. In this example, the data source is a survey completed by job fair participants. Participants would be asked questions that directly relate to the outcome statements. For instance, you may include: “how would you rate the job fair?” and give them options from “poor” to “excellent.”

The target achievement level is based on your target audience (in this case, 200 people). You are estimating these numbers. Ask yourself what would success look like? In this case, 160 or 80% rating the job fair highly would equal success. Be realistic with your targets. Don’t expect perfection—the grant reviewers don’t.



## A basic example (continued)

- Can you think of any additional ways to measure these outcomes?
  - What about circulation stats?
  - What about looking at job-related reference questions asked or program attendance post-job fair?
- Which outcomes show the greatest impact? Which one is a “lite” outcome?

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Text of narration:

Can you think of any other ways to measure these outcomes? You may want to look at circulation stats before and after the job fair. If circulation of job and education resources jumps post-job fair, this data would support the second and third outcomes. You may also want to measure related reference questions and program attendance.

Also, not all outcomes are created equal. Some show greater impact and some are considered “lite” outcomes. In this example, which one is the “lite” outcome? It is the first one: participants rate the job fair highly. This outcome does not significantly change the target audience like the others. The other outcomes indicate that job fair participants are taking away new knowledge and a new attitude as a result of the fair. “Lite” outcomes can be used, but be sure to include high impact outcomes as well.

## Outputs

- Up to this point, you may have evaluated your programs in terms of outputs—measurable items or products (think numbers)
- Examples:
  - # of exhibitors
  - # of participants



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Outputs. If you are brand new to OBE, you are probably not brand new to evaluation. Up to this point, you have likely evaluated your programs and services using outputs. Outputs are simply the measurable items or products that come out of your project. In other words, think numbers. In our example, the number of exhibitors and the number of participants at the job fair are outputs.

## Outputs (continued)

- While outputs provide valuable information, they are not outcomes and they do not show impact
- Example:
  - Output: 200 people attended the job fair
  - Outcome: 120 or 60% report they learned about at least one job or education resource that they plan to use



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Text of narration:

Outputs are not outcomes. I'm going to repeat this because this is probably the second most important thing we'll cover: outputs are not outcomes. Outputs do not show impact. Here's an example:

- Output: 200 job fair participants

-Outcome: 120 or 60% report they learned about at least one job or education resource that they plan to use

Can you see the difference? Yes, you had 200 people attend the fair, but so what? The "so what" is the fact that 60% took away new knowledge that will help them with their job search. This information can be much more powerful.

## Common myths

- **You might be thinking:**
  - *OBE is really complicated*
  - *I don't have the time or resources*
  - *There's only a "right" way to do OBE*
  - *I already know what our clients need, and that our programs and services are meeting those needs*



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Text of narration:

OBE can be a bit overwhelming at first. It's important to let these concepts sink in. Here are a few myths about OBE that will help address some of the things you might be thinking:

- *OBE is really complicated*: This is not true! OBE is a systematic approach. It can take some getting used to, but with practice, you can do it. If you can plan and manage a program, you can surely implement OBE.

- *I don't have the time or resources*: This is not true! OBE activities are often similar to what you're currently doing. Do you plan? Do you collect data? Make your efforts outcome-based, and you'll have strong information to assist in decision-making. Funders love to support high-impact programs, too.

- *There's only a "right" way to do OBE*: This is not true! Yes, this webinar will introduce you to the step-by-step approach, but you can then make it your own. Feel free to tailor the process for your library. There can be many "right" ways to implement OBE.

- *I already know what our clients need, and that our programs and services are meeting those needs*: This may not be true! You might be right, but it's best to check your assumptions using OBE. You may uncover something new or better for your clients. Stakeholders will be looking for more than just assumptions, too.



## Program evaluation benefits

- **Big on planning ahead**
- **Shifts focus to the target audience**
- **Organizes the collection of data and promotes consistency**
- **Meets stakeholder requirements**
- **Strengthens proposals**

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Text of narration:

There are many benefits to using OBE. First, OBE is big on planning. Many automatically think the approach is just about evaluation, but the two really go hand in hand. OBE puts the focus on the target audience, not on the program and activities. It's about the impact that you have, and not as much about what it is that you are doing. For these reasons, OBE creates strong grant proposals.

## Management benefits

- Assists in decision-making
- Provides objective information
- Helps make the argument for change when change is resisted
- Enables comparison to other libraries with similar programs and services



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Text of narration:

Management benefits. OBE helps in decision making. The approach provides objective, organized information. Which programs are having the biggest impact? Which should receive increased funding and resources? Which, if any, are not effective and should be pulled? It can help make the argument for change when change is needed.

## Advocacy benefits

- Shifts focus to the target audience
- Provides powerful data to support programs and services
- Shows the library is making a difference
- Enhances public relations



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Advocacy benefits. Again, OBE shifts the focus to the target audience. It can be a very effective advocacy tool, as it provides powerful data that can support library programs and services. You can clearly show stakeholders that the library is making a significant difference. This information can enhance public relations.

## Who is using OBE?

- **Local, state, and federal agencies**
- **Many others**
  - **Private funders**
  - **Non-profits**
  - **Businesses**



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Text of narration:

Who is using OBE? OBE is becoming more common. As mentioned before, many grant makers are requiring it. The New York State Library and the federal Institute of Museum and Library Service require OBE for several of their grant programs. Many non-profits and businesses are also using OBE as an effective planning and evaluation method.

## Second example

- **Need**: School teachers and staff need to learn the new online library catalog
- **Program**: The school librarian will hold catalog training



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Text of narration:

Now, let's take a look at another example. In this scenario, the school library just instituted a new online catalog, and school teachers and staff need to learn how to use it. Catalog training is the planned program that will meet this need.



## Second example (continued)

- **Activities**: The school librarian will hold 10 training sessions on effective online catalog searching
- **Target audience**: 100 teachers and staff

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Text of narration:

Activities for this program include holding 10 training sessions on effective catalog training. Again, I'm simplifying here. You may include curriculum development, scheduling, promotion, evaluation, etc. The target audience is 100 teachers and staff.

## Second example (continued)

- Administration is asking that training results be documented
  - Can you come up with 3 outcomes for the training?
  - Remember that outcomes must be predictable, measurable, and indicate change in the target audience



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School administrators have asked that training results be documented, and what better way to do that than with OBE. OBE is a great fit for trainings and classes like the genealogy database class described earlier. The outcomes always revolve around improving knowledge or skills.

Can you come up with three outcomes for the catalog training? Again, remember the checklist:

- Must be predictable
- Must be measurable
- Must indicate change in the target audience

## Second example (continued)

- **Possible outcomes:**
  - Participants demonstrate effective online catalog searching at training completion
  - Participants use the catalog post-training
  - Participants' use of library resources increases post-training



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Text of narration:

Here are three possible outcomes:

- Participants demonstrate effective online catalog searching at training completion.
- Participants use the catalog post-training.
- Participants' use of library resources increases post-training.

Note that these outcomes go beyond the training period and look at changes in behavior post-training. After all, that is the overall goal: to get participants to use the catalog on their own and take out library resources. It is important to step back when you're writing your outcomes and make sure you've captured the big picture. Also, think about stakeholders—what is it they would want to know?



## Second example (continued)

- **Adding data source and target achievement level:**
  - Participants demonstrate effective online catalog searching at training completion (measured by trainer observation/checklist with target of 90 or 90%)
  - Participants use the catalog post-training (measured by participant survey with target of 70 or 70%)
  - Participants' use of library resources increases post-training (measured by participant survey with target of 70 or 70%)

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Text of narration:

Now, let's add the data source and the target achievement level. With the first outcome, our data source is observation by the trainer using a checklist. In this case, the trainer may check in with each participant near the end of the training and ask them to complete a prescribed search. The trainer would check off that the appropriate steps were done by the participant. A realistic target achievement level for this group is 90 or 90%. However, if this was a training for the public, your target achievement level may be lower (as it's likely this group would be less computer literate).

Outcomes two and three have a different data source. At three months post-training, all participants will be asked to complete a survey about their catalog and library use. For example, the survey may ask "how many times have you used the library's online catalog since attending the training?" with possible answers ranging from "none" to "more than 20." You may also ask about their use of library resources before the training and after. This would support outcome three. However, since we are predicting an increase, we must obtain a baseline—hence, the before and after questions.

## Second example (continued)

- **Can you think of any additional ways to measure these outcomes?**
  - **What about a quiz at the end of the training?**
  - **What about looking at catalog use stats and circulation stats post-training?**



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Text of narration:

There are other ways to get at this information. Can you think of any? What about a quiz on catalog searching at the end of the training? This may be a better option if you have a bigger class, since observation takes up significant trainer time. For outcomes two and three, you may also want to look at catalog use and circulation statistics. If these figures jump post-training, then they support your outcomes.

But what if they don't? What if your program doesn't succeed as you had predicted? It happens. OBE is highly effective in demonstrating impact, but it's important to remember that OBE can help you determine what library programs and services are not working, too. This is information that you need to know to make improvements.

## Recap

- **You can use OBE to:**
  - Plan effective programs
  - Measure your library's impact
  - Show your library's achievements
  - Seek funding, resources, and support
  - Submit consistent applications and reports



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Text of narration:

To recap, I hope this webinar has given you a solid introduction to OBE. Again, let it all sink in. Review the examples, and practice writing outcomes for your own programs. It will come.

Remember, you can use OBE to:

- Plan, plan, plan—it's not just about evaluation
- Measure impact—answering the important “so what?” question
- Show your library's achievements and advocate for funding and resources
- Be consistent and organized with proposals and reports



## More information

- **New York State Library: OBE page**  
<http://www.nysl.nysed.gov/libdev/obe/index.html>
- **IMLS: OBE page**  
<http://www.ims.gov/applicants/obe.shtm>  
(includes great webography of OBE resources)
- **Free Management Library: Basic Guide to Outcome-Based Evaluation for Nonprofit Organizations with Very Limited Resources**  
<http://managementhelp.org/evaluatn/outcomes.htm>

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The following links are excellent OBE resources that I encourage you to check out.

New York State Library OBE page:

**<http://www.nysl.nysed.gov/libdev/obe/index.html>**

IMLS OBE page:

**<http://www.ims.gov/applicants/obe.shtm>**

Free Management Library, Basic Guide to Outcome-Based Evaluation for Nonprofit Organizations with Very Limited Resources:

**<http://managementhelp.org/evaluatn/outcomes.htm>**

Again, if you are interested in learning more about developing a complete OBE logic model, please visit the New York State Library's OBE page. OBE workshops are also periodically offered and posted here.

To conclude, I wish you the best of luck with your OBE project.