

Integrating the Strategic Plan, Logic Model, and Workplan

There are three primary program planning tools that you can develop and use to understand and monitor your program's implementation — strategic plan, logic model, and annual workplan. This brief will define strategic plan, logic model, and workplan; describe how they are related (see Table 1 on page 2); suggest how you can visually link them; and explain why linking them is beneficial. Program planning is the foundation of good evaluation because it determines what objectives a program intends to accomplish, determines how these objectives will be accomplished, and provides ways to measure their accomplishment.

Definitions

A strategic plan is a document that describes your program's strengths, weaknesses, opportunities, and threats, and outlines five-year program goals, strategies to achieve the goals, and directions for the five years of the cooperative agreement. It is a program planning tool that provides a blueprint to strengthen program activities, address areas for improvement, and move the program forward to new accomplishments.

A logic model is a pictorial diagram that shows the relationship between your program components and activities and desired health outcomes. It is a visual way to present and share your understanding of the relationships among the resources you have to operate your program, the strategies/activities you plan to implement, and the outputs and outcomes you hope to achieve. At the beginning of your project, you created a logic model that provides an overview of your entire program for the five years of the cooperative agreement.

A workplan is a concise easy-to-read overview of your goals, strategies, objectives, measures, activities, timeline, and those responsible for making the program happen. It is a detailed road map for running the program for a given one year budget period. The components of the workplan that most closely align with the logic model and strategic plan are five-year program goals, strategies identified in the strategic plan, and School Level Impact Measures (SLIMs).

Similarities and Differences Between a Strategic Plan, Logic Model, and Workplan

Although there is some overlap between the strategic plan, logic model, and workplan, the differences among them are important. The strategic plan describes the broad strategies a program will use to achieve its five-year program goals. The logic model illustrates the presumed *effects* of implementing the strategies described in the strategic plan. In contrast, the workplan is the program coordinator's guide to running the program on a yearly basis. The strategic plan and logic model both give an overarching five-year view of the program and goals. The workplan walks the user through the specific, annual program objectives, program timeline, and an outline of what particular *people need to do* to implement the program (e.g., create criteria for identifying partnership members, recruit the members, convene the meetings, document the meetings).

Table 1 shows how the five-year strategic plan and five-year logic model relate to each other and to the annual workplan. For example, you might have a five-year program goal: "to decrease risk behaviors associated with HIV infection among students within the school district." The logic model would reflect this goal as a long-term outcome: "decreased student risk behaviors associated with HIV infection." You might have a program strategy to achieve this goal such as; to "form a community partnership that advocates for

HIV-prevention education in schools”; and this would be represented in the logic model in the strategies/activities column. The strategic plan includes a timeline for implementing each program strategy, and the yearly workplan will reflect this timeline. For example, if you planned to implement a strategy to strengthen partnerships in Years 2 through 4, then only the workplans for years 2, 3, and 4 would include that strategy and its corresponding objectives and activities. The implementation timeline for the strategic plan also influences the outputs in the logic model (e.g., “existence of a partnership group that meets quarterly”) and the outcomes in the logic model (e.g., “HIV information disseminated to schools”). Finally, each SLIM indicated in the workplan is reflected in the logic model as a short-term or intermediate outcome (e.g., “10% increase in schools with HIV policies”). Table 1 shows how the three tools are related. Together they can help you with planning, implementing, and monitoring your program.

Need for Alignment and Linkage

If you do not have a logic model to guide your work, you may have trouble charting a road map for your program. Because the logic model reflects your program, it is important that the logic model aligns with the five-year program goals and strategies your program has identified in its strategic plan. In turn, the strategic plan and logic model should guide the objectives and activities for implementing strategies you select and describe in your annual workplan. To ensure their utility as planning tools, periodically consult and compare the strategic plan, logic model, and workplan, especially when writing your workplan each year.

Developing, linking, and using all three planning tools will help you ensure that your program remains on target and reaches its goals.

Table 1. Similarities Among the Five-Year Strategic Plan, Logic Model, and Components of the Workplan

Strategic Plan Components	Logic Model Components	Workplan Components
Not applicable	Overall program goal	Not applicable
Five-year program goals	Long-term outcomes	Five-year program goals
Strategies	Strategies/activities	Strategies
Rationale for program strategies	Logical links between strategies/activities and intended outcomes	Not applicable
Timeline for implementation of strategies	Outputs and short-term, intermediate, and long-term outcomes	Strategies
Effects of implementing strategies	Short-term and intermediate outcomes	SLIMs

Resources

Centers for Disease Control and Prevention. *Strategic Planning Kit* and *Strategic Planning Graphic*. Division of Adolescent and School Health website, 2008. http://www.cdc.gov/HealthyYouth/evaluation/sp_toolkit.htm

Office of victims of Crime (U.S.). *Strategic Planning Toolkit*. U.S. Department of Justice. <https://www.ovcttac.gov/taResources/stratPlan.cfm>

Centers for Disease Control and Prevention. *Logic Models 1: The basics; Logic Model 2: Constructing a Logic Model; and Writing Good Goals and Smart Objectives*. Division of Adolescent and School Health website, 2008. <http://www.cdc.gov/HealthyYouth/evaluation/resources.htm>