APPENDIX
Reference Tools and Resources

Blank Logical Framework Grid

Objectives	Success Measures	Verification	Assumptions
Goal:	Goal Measures:		Assumptions to reach Goal:
Purpose:	Purpose Measures:		Assumptions to achieve Purpose:
Outcomes:	Outcome Measures:		Assumptions to produce Outcomes:

Inputs: Activities and Resources

Schedule (in weeks, months, etc.)

Assumptions for Inputs:

	Responsible	Resources	Schedule (in weeks, months, etc.)														
1. Outcome #1																	
1.1																	
1.2																	
1.3																	
2. Outcome #2																	
2.1																	
2.2																	
2.3																	
3. Outcome #3																	
3.1																	
3.2																	
3.3																	
4. Outcome #4																	
4.1																	
4.2																	
4.3																	
5. Outcome #5																	
5.1																	
5.2																	
5.3																	
6. Outcome #6																	
6.1																	
6.2																	
6.3																	

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Logical Framework Quality Checklist

Review how well each element of your LogFrame meets these criteria
(*? = Maybe*).

Goal Check

___Yes ___No ___?   1. Supports or describes an important strategic objective.

___Yes ___No ___?   2. Stated clearly in measurable terms.

___Yes ___No ___?   3. Not the project name, a restatement, or summary of the Purpose/Outcomes.

Purpose Check

___Yes ___No ___?   4. LogFrame has a single Purpose, clearly stated.

___Yes ___No ___?   5. Describes change in behavior, performance, or conditions expected.

___Yes ___No ___?   6. Describes impact expected from Outcomes; doesn't summarize them.

___Yes ___No ___?   7. A level above the implementation team's direct control.

___Yes ___No ___?   8. Purpose plus Assumptions are both *necessary and sufficient* to reach the Goal.

Outcomes Check

___Yes ___No ___?   9. Outcomes clearly describe what the team can deliver or make happen.

___Yes ___No ___?   10. The Outcomes are logically chunked. No overlaps/gaps.

___Yes ___No ___?   11. All Outcomes necessary to achieve Purpose are included (none missing).

___Yes ___No ___?   12. Each Outcome is necessary to achieve Purpose (no non-essentials).

___Yes ___No ___?   13. Collectively, this set of Outcomes will achieve Purpose.

___Yes ___No ___?   14. Outcomes plus Assumptions are both *necessary and sufficient* to achieve Purpose.

Activities Check

___Yes ___No ___?   15. The key activities for each Outcome have been listed.

___Yes ___No ___?   16. Activities are chunked at roughly the same level of detail.

___Yes ___No ___?   17. Together, the activities can produce the Outcomes.

Measures Check

___Yes ___No ___?   18. Specific in terms of quantity, quality, and time.

___Yes ___No ___?   19. Measures what is important about each Objective.

___Yes ___No ___?   20. Each Measure has a practical means of verification.

___Yes ___No ___?   21. Changes in status of Measures attributable to achievement of Objective.

Assumptions Check

___Yes ___No ___?   22. Formulated as desirable, positive conditions that must exist for valid *If-then* logic.

___Yes ___No ___?   23. Placed at the level of Objective they affect.

___Yes ___No ___?   24. Clearly stated and include Measures as appropriate.

___Yes ___No ___?   25. Cover all key outside factors that impact the project.

General Check

___Yes ___No ___?   26. Acronyms and abbreviations have been spelled out.

___Yes ___No ___?   27. The logic among Inputs, Outcomes, Purpose, and Goal is sound.

___Yes ___No ___?   28. Developed by key players, or will be reviewed by them.

___Yes ___No ___?   29. Permits development of linked tools (WBS, Gantt, etc.).

Logical Framework Application Case Studies

The following case studies illustrate a variety of client applications of the LogFrame. Many of these may serve as basic templates that you can modify and use to fit your projects.

Organization Turnaround and Best Practice Example
(Fircrest School for the Developmentally Disabled)

Fircrest School for the Developmentally Disabled is a residential home for some 800 adults and children who suffer from serious mental, physical, and emotional developmental disabilities. Fircrest is funded by both the State of Washington and the federal government, and is managed by the Washington State Department of Social and Health Services.

Several disturbing incidents indicated that residents were not being properly treated and their quality of life was low. There were some unexplained injuries to residents and even one suspicious death. Visiting experts noted an overuse of psychoactive medications and restraints. Quality assurance was lacking. Medical and nursing care records were not timely and accurate. Too many nurses were assigned to administrative duties and too few to resident care and treatments.

Following an audit, federal certification was revoked, along with millions of dollars of federal funding. This presented Fircrest management with a serious problem that needed solving quickly and in the right way. Project manager Katie Cameron used the Logical Framework with her project team to develop a strategy to regain federal certification.

This example reflects a best practice use of LogFrame concepts. In particular, it includes good Measures and Verifications at all levels along with a clear and well-organized work plan (Input level).

Logical Framework for
Improving Social Service Delivery (Fircrest School for the Developmentally Disabled)

Objectives	Success Measures	Verification	Assumptions
Goal: Federal certification standards are achieved and maintained at Fircrest School.	**Goal Measures:** 1. Sometime after October 31, all ICF/MR regulatory surveys will be completed with no findings of conditional level deficiencies. 2. Fircrest continues to operate at high standards of health, safety, quality care and human rights.	1. Written decision from survey team with no conditional level findings. 2. Follow-up annual surveys with no negative findings.	**Assumptions to reach Goal:** 1. DSHS Secretary does not make agreement with government that Fircrest is unaware of. 2. No unanticipated Federal government (Dept. of Justice) litigation actions. 3. State Attorney General will have plan in place to file appeal by 8/3.
Purpose: People who live at Fircrest are safe, healthy, receive quality care and their human rights are protected.	**Purpose Measures:** 1. A 50% reduction in resident injury that requires nursing, medical care or intervention occurs between 1/1 and 10/31. 2. No unusual or suspicious resident deaths occur between 1/1 and 10/31. 3. An 80% reduction in restraints and time out use will be achieved between 1/1 and 10/31. 4. A 25% reduction in number of residents being prescribed psychoactive medication occurs between 1/1 and 10/31. 5. 75% of residents are engaged in paid work activities for three or more hours per day by 9/1.	1.1 Review and summarize incident reports. 1.2 Review/tabulate injuries from medical notes. 2. Review coroner reports. 3. Review and summarize restraint and time out records. 4. Review pharmacy/drug administration records. 5. Collect, review and summarize resident production records and paycheck information.	**Assumptions to achieve Purpose:** 1. Resident injuries are all reported on incident reports and progress notes. 2. Coroner conducts autopsies on all deaths. 3. Staff fill out restraint/time out records. 4. Production records are kept with sufficient detail.

Objectives	Success Measures	Verification	Assumptions
Outcomes:	**Outcome Measures:**		**Assumptions to produce Outcomes:**
1. New resident rehabilitation program system is implemented.	1.1 By July 1, 95% of resident (awake) hours will be organized and managed by new treatment programs.	1.1 Observe each hour of program at each training site.	1. Staff are adequately trained and aware of new program expectations.
2. Quality Assurance system is implemented to maintain rehabilitation program changes.	2.1 At least 10 FTEs are assigned to conduct QA activities.	2.1 Check personnel records.	2. Union agreement can be reached.
	2.2 QA checklist with target program indicators is implemented in all training locations.	2.2 Checklist published.	
3. Facility reorganized with staff redeployed.	2.3 QA data is used by program teams to modify/revise/correct faulty programs.	2.3 Survey all program teams for use of data.	3. Chosen leading indicators are accurate reflections of good programs from the perspective of the survey team members.
	3.1 By June 1, 100% of affected staffing change will be completed. Staff better deployed to support resident care and treatment.	3.1 Check personnel records.	
4. Human rights protection is implemented.	4.1 100% of resident behavior programs and 100% of prescribed psychoactive medications have consent from legal representative by 9/1.	4.1 Records reviewed.	4. Forms and records changes selected will result in "real" rather than "perceived" time savings for targeted personnel.
	4.2 By September 1, 80% of resident-initiated grievances will be recognized/responded to by at least one protection committee member within 48 hours.	4.2 Minutes reviewed.	
5. Medical and nursing care records are streamlined to free up more MD and nurse treatment hours.	4.3 An ombudsman is available for residents and families by June 15.	4.3 Appointments announced.	5. Maintenance man-hours and funding available.
	5.1 By June 15, new medical record forms are in 100% of resident charts and are being completed accurately.	5.1 Sample 25% of records.	
6. Physical plant "beautification" and modifications to support new programs are completed.	5.2 By September 1, at least 85% of nurses and MDs will increase treatment hours by 20%.	5.2 Nurses and MDs will conduct one week of self-survey/work-time study.	6. Budget authorized.
	6.1 1000 square feet of a new day program space is created by June 1.	6.1 Tour and measure space.	
	6.2 New living room furniture and furnishings will be in place in 28 houses by August 1.	6.2 Tour all homes.	
	6.3 All campus lawns are cut to "acceptable" level and maintained on weekly basis, beginning May 1.	6.3 Spot check weekly.	

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Inputs: How team will produce Outcomes

Action Steps	Responsible	$	J	F	M	A	M	J	J	A	S	O	N	D	Assumptions for Inputs:
1. NEW RESIDENT REHABILITATION PROGRAMS		$60K													1. QA System/data can be computerized
1.1 Retain technical experts	Director		▮												2. Computer staff have expertise to design adequate system
1.2 Develop schedule	Expert		▮												
1.3 Retrain staff	Expert			▮											
1.4 Write new resident programs	Staff									▮					3. Union agreement reached
1.5 Implement and modify new programs as needed	Staff												▮		4. Sufficient volunteers and non-staff committee members can be appointed
2. QUALITY ASSURANCE SYSTEM		$25K													
2.1 Assign staff	Superintndnt					▮									
2.2 Design system	Expert					▮									
2.3 Purchase computers	Bus. Mgr.					▮									
2.4 Create prototype	QA Team						▮								
2.5 Collect QA data	QA Team											▮			
2.6 Distribute QA data	QA Team											▮			
3. REORGANIZATION															
3.1 New/changed roles and responsibilities determined	Expert														
3.2 Roles matched to job classes	Personnel				▮										
3.3 Resources for new roles determined	Superintndnt				▮										
3.4 Negotiate with unions	Superintndnt				▮										
3.5 Notify affected staff	Personnel			▮											
3.6 Staff practice new roles	Staff											▮			
4. HUMAN RIGHTS SYSTEM															
4.1 Write policy/procedure	Expert		▮												
4.2 Establish new committees	Superintndnt				▮										
4.3 Appoint committee members	Superintndnt				▮										
4.4 Analyze QA data	Chair											▮			
4.5 Review with Superintendent	Chair											▮			
5. MEDICAL RECORDS		$3K													
5.1 Identify target records	Expert					▮									
5.2 Draft new forms and chart contents	Records					▮									
5.3 Change forms/reprint new forms	Records							▮							
5.4 Retrain staff	Staff									▮					
5.5 Purge and revise charts	Staff							▮							
6. PHYSICAL PLANT MODIFICATIONS		$500K													
6.1 Design new program space	Staff			▮											
6.2 Determine furniture requirements	Staff			▮											
6.3 Purchase materials and furnishings	Bus. Mgr.								▮						
6.4 Remodel/construct	Plant Mgr.								▮						
6.5 Install new furnishings	Plant Mgr.								▮						
6.6 Grounds maintenance scheduled implemented	Plant Mgr.											▮			
	$ Total	**$588K**													

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Develop or Update Strategic Plan
(Lawrence Livermore National Laboratory—LLNL)

This case study shows how the LLNL Safety and Security Division (SSD) defined their strategic thrusts and turned each into LogFrame execution plans.

The services provided by this organization became even more important after 9/11. The organization's responsibilities ranged widely from physical security (guns, gates, and badges) to computer security to protection of vital nuclear assets on site. Division leadership recognized the need to upgrade their strategic plans in order to increase operational effectiveness.

To give you a feel for how an outside process consultant can catalyze an organization's strategic planning efforts, read about what happened when I was invited to facilitate SSD's planning sessions. My consulting support consisted of a one-day preparation session with eight top leaders, a two-day training session with 30 senior leaders and supervisors, and a one-day follow-up session with all participants.

On the morning of the preparation session, I met with their key leaders to understand the context of and constraints on the effort. In the afternoon, an 18-person management team brainstormed possible strategic Objectives by pulling from related strategic plans. The list of some 40 Objectives was refined into logical categories, which were later re-chunked into four LogFrame Strategies.

These four selected strategies form a useful acronym (CLIM), which stands for:

1. *C*ommunicate Effectively
2. *L*ead & Develop People
3. *I*mprove Processes
4. *M*anage Strategically

At a two-day, off-site session a week later, I trained a 30-person leadership team. They then organized themselves into four project teams that would develop Logical Frameworks for each strategy. They left the session with solid draft plans, and the CLIM acronym helped managers communicate the general strategy with their teams after the workshop. A one-day follow-up was held a month later to review progress and fine-tune their plans.

SSD has since moved forward on all four strategies at a pace that has allowed them to make steady progress, but not overwhelm the people who still had their other operational roles and responsibilities.

One of their LogFrames, *Communicate Effectively*, is included here.

Logical Framework for Communicate Effectively

Objectives	Success Measures	Verification	Assumptions
Goal: Effective departmental communication.	**Goal Measures:** 1. UC Contract, DOE, institutional performance measures are met.	1. Finding free this year.	**Assumptions to reach Goal:** 1. Information is credible and has value.
Purpose: Disseminate information effectively both externally and internally.	**Purpose Measures:** 1. Quality of communications improved, people feel better informed.	1. Customer survey.	**Assumptions to achieve Purpose:** 1. Employees embrace organizational values.
Outcomes: 1. Employee and customer information needs are established. 2. Expected methods of communication are identified and used. 3. Forums of communication are established and utilized. 4. Communication GAP Analysis conducted.	**Outcome Measures:** 1. Conduct baseline survey and evaluate results by March 31. 2. Expected communication methods are developed and implemented by April 30. 3. Forums are developed and documented via communication plan by May 31. 4. A survey to identify strengths and weaknesses is conducted by June 15.	1. Survey findings. 2. Communication plan. 3. Communication plan. 4. Completed document.	**Assumptions to produce Outcomes:** 1. Resources will be available to implement improvements (people, money). 2. Culture supports continuous improvement philosophy. 3. The "Daily Grind" will not override attempts to "make it better." 4. No unanticipated external factors will intervene to stunt improvement.

Inputs: How teams will produce Outcomes

Action Steps	Responsibilities	Resources	Schedule (in weeks, months, etc.)									Assumptions for Inputs:
1. INFORMATION NEEDS - Establish team - Define structure of focus group - ID focus group participation - Develop employee/customer survey - Review survey and analyze data												
2. COMMUNICATION METHODS - Identify current methods of communication - Define expected methods												
3. FORUMS ESTABLISHED - Consider alternatives - Choose appropriate ones												
4. GAP ANALYSIS - Identify organizations to benchmark - Poll customers and employees - Analyze data - Develop and Implement solutions												

Reinvent Your Department
(Los Alamos National Laboratory—LANL)

The Facilities Maintenance Unit (FMU) at the Los Alamos National Laboratory (LANL) aimed at nothing less than total transformation because customer demands were increasing and they were falling far behind.

The role of a FMU in any organization is seldom glamorous but always vital. The FMU at LANL keeps the electrical, mechanical, HVAC, and other systems operating so that scientists can carry out their work in support of national security.

This Lab FMU served 8 very old facilities dispersed over a 30-square-mile radius. The level of maintenance required exceeded staff capacity. As the backlog of work orders climbed, conflicts increased and morale declined.

The FMU Director recognized that a major transformation was necessary, not just minor improvements. Assisted by outside consultants, his team collaboratively developed a vision, mission, values, and code of conduct. All staff participated in the process through a series of brief workshops over a two-month period.

With those elements in place, it was time to shape the master improvement strategy, summarized by the included LogFrame. Outcomes such as "Roles clearly defined" and "Priorities sharpened" are part of any improvement strategy and were vital to achieving clarity. Later, sub-teams were formed to create additional LogFrames for key projects.

The FMU LogFrame is interesting because of the specificity of its Purpose level Success Measures. The Outcomes offer a set of ideas about possible improvement elements that can transform your own organization's future.

Logical Framework for
Facilities Maintenance Unit (FMU) Transformation

Objectives	Success Measures	Verification	Assumptions
Goal: Improve facility infrastructure and services at the Lab.	**Goal Measures:** 1. Conditions improve as measured by standard criteria in documents x, y and z.	1. Annual Facility Assessments.	**Assumptions to reach Goal:** 1. Resources available to perform annual assessments. 2. Data maintained/reported.
Purpose: Transform Facilities Maintenance Unit (FMU) into a highly responsive, effective, and efficient facility management organization.	**Purpose Measures:** 1. By October 31, annual customer satisfaction rate is consistently >90%. 2. Work order response time decreases from current average of ___ days to average of <30 days by ___. 3. Work order backlog of ___ is reduced to <200 and maintained <200. 4. Work order age is reduced to <60 days and maintained <60. 5. Monthly and annual PM compliance rate reaches and is maintained at 100%. 6. Employee satisfaction reaches and remains above 90% and 90% of employees give team environment high rating. 7. 95% of all projects are completed on schedule, within approved budget, and with change orders totaling less than 10% of approved budget.	1. Survey results. 2. Weekly work order reports. 3. Weekly work order reports. 4. Weekly work order reports. 5. Monthly PM schedule compliance reports. 6. Annual employee survey. 7. Monitor project.	**Assumptions to achieve Purpose:** 1. No unforeseen calamities. 2. Maintenance staff is committed to program. 3. Good communication among staff.
Outcomes: 1. Analysis of strengths and weaknesses of facility management unit completed. 2. Roles and responsibilities within the organization clarified. 3. Key strategies, objectives, and priorities identified. 4. Facility condition assessments for all major facilities completed and updated annually. 5. Objective priority system established for work orders and projects. 6. Plan for improving cooperation and team work among employees developed and implemented. 7. Formal processes established to effectively support improved operations.	**Outcome Measures:** 1. Completed analysis performed by March 1 with customers and employees involved. 2. Meeting with employees where roles and responsibilities are explained, understood, and accepted by April 1. 3. By June 1, management team has agreed. 4. All major facilities have completed condition assessment by June 1. 5. Completed priority system document completed by July 11. 6. Plan developed and endorsed by employees; employees satisfaction reaches and remains above 90% by July 15. 7. 100% of team-identifed formal process needs have been met by August 1.	1. Written analysis. 2. Meeting minutes. 3. Sign-off on document. 4. Finished Assessments on file. 5. Document on file. 6. Plan on file. 7. Quarterly Inspections on file.	**Assumptions to produce Outcomes:** 1. Maintenance staff is capable and willing to do this. 2. Group meetings held monthly.

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Strengthen Teamwork Across Functions
(ARINC Director Action Group Task Force)

ARINC, an Annapolis systems engineering company, is best known for managing aircraft communications over the Atlantic Ocean as well as for their airport status display systems.

ARINC used the LogFrame with executive task forces. They adopted this tool as an innovative way to help groom director-level staff members and ready them to become VPs. Promising executives were selected from across the company and put into a Director Action Group (DAG). DAGs were assigned a business initiative sponsored by the president of the company and given six weeks to deliver. The LogFrame helped them get a rapid start and facilitated discussion across the various functional perspectives represented in each group.

This case study LogFrame aims at establishing an overseas infrastructure to strengthen their business in Europe.

Logical Framework for
Building Infrastructure for Global Growth through Acquisition

Objectives	Success Measures	Verification	Assumptions
Goal: ARINC has an infrastructure that facilitates global growth in multiple market segments.	**Goal Measures:** 1. Revenue and EBIT grows by 15–20% within two years in at least two identified international markets 2. Five Year Plans contain significant revenue and EBIT from international sources. 3. ARINC expands into a new global location within three years.	1. Financial reports show actual growth over fiscal years. 2. Backlog and bookings f igures for future/current business associated with new products/services. 3. ARINC establishes a viable business entity within another region.	**Assumptions to reach Goal:** 1. ARINC will have the capital funding that may be required to support growth.
Purpose: Executive Management has sufficient information to implement an effective international business operations infrastructure.	**Purpose Measures:** 1. Within 6 months of briefing, at least 50% of recommendations have been adopted in at least three of the sub-categories. 2. Within 1 year, 75% of corporate business units have adopted at least 80% of recommendations in each sub-category. 3. Two new product/service offerings identified that are specific to a unique international market.	1. Review corporate business policies. 2. Review policies. 3. Review plans.	**Assumptions to achieve Purpose:** 1. Corporate management is receptive to change in their international operations. 2. In order to meet corporate growth goals, ARINC needs to expand into global markets. 3. Core products and services can be adapted to different market segments.
Outcomes: 1. Summary report on company selection criteria for 8 potential acquisition companies completed. 2. Benchmark study of 5 companies (including ARINC) completed. 3. Comparative analysis of 5 companies performed. 4. Alternative structural analyses completed. 5. Presentation completed and Executive Management is briefed.	**Outcome Measures:** 1. Sponsor concurs with both criteria and with 80% of companies identified by June 11. 2. 75% of required data collected for each company by July 1. Template is compiled for each selected company by July 4. 3. 90% of DAG members and sponsor review completed studies by July 10. 4a. Responses are categorized and assembled in matrix form. 4b. Value judgment and expertise applied to comparative data to develop analyses that are relevant and/or will benefit ARINC. 5. All six sub-categories contain comparative data relevant to ARINC.	1. Successful sponsor meeting. 2. Completed templates are reviewed and approved by the DAG group and sponsor. 3. Matrix and comparative analyses are finalized for review with sponsor at July DAG meeting. 4. Feedback from executive staff during presentation. 5. Completed briefing.	**Assumptions to produce Outcomes:** 1. Outside company respondents are credible. 2. Data are accurate. 3. Eight companies provide a representative and comprehensive platform to conduct review. 4. Responses can be obtained on schedule. 5. Enough similarities exist between companies to conduct a valid comparative analysis.

Develop Information Technology Process Solutions and Algorithms
(U.S. Department of Energy)

Nuclear weapons remain an essential component in the national security strategy of the United States. Each year the U.S. Department of Energy (DOE) Secretary must certify to the President that the stockpile is reliable. A team from the DOE developed a new anomaly tracking system to support the Energy Secretary's need to provide this certification.

Since 1992, various international treaties have prevented the occasional live testing of a nuclear weapon from the arsenal to make sure that all of them would still function if needed. To maintain these weapons as a potent deterrent, reliable nuclear weapons assessment methods (other than detonation above or below ground) must be used.

Ensuring nuclear stockpile reliability involves lab tests, computer simulations, and analyses of all types. Surveillance of nuclear assets is critical, and the system to do so is complex. Occasionally, an anomaly shows up that needs investigating and resolution.

This LogFrame was developed by a team responsible for developing and managing an anomaly tracking system. Speeding up anomaly disposition allowed for more timely decisions, which supports the overall Goal of certifying stockpile reliability.

Logical Framework for
Reducing Cycle Time for Anomaly Detection

Objectives	Success Measures	Verification	Assumptions
Super Goal: Ensure stockpile reliability.	**Super Goal Measures:** Stockpile fitness report reflects more up-to-date information in regards to Anomaly disposition.	Compare current and past reports.	**Assumptions to reach Super Goal:**
Goal: Reduce cycle time from Anomaly detection through closeout.	**Goal Measures:** 1. X% of ATs closed w/in established limits by ____. 2. Y% of ATs dispensed within established limits by ____.	1. Review dates from start to finish and compare to metrics identified in process.	**Assumptions to reach Goal:** 1. AT process performs as designed.
Purpose: Release and implement new "Anomaly Tracking" (AT) process.	**Purpose Measures:** 1. X months after process release, lifecycle will be reduced from ____ to ____ days. 2. By ____, lifecycle will be reduced to ____ days.	1. Compare data with baseline data from value stream report.	**Assumptions to achieve Purpose:** 1. Complex is on-board. 2. Management support continues.
Outcomes: 1. New Anomaly Tracking (AT) process released. 2. PMO created and staffed. 3. PMO launched. 4. AT Process Training Program developed and taught.	**Outcome Measures:** 1. Reviewed, signed and released to WFS. 2.1 Org. chart released to 2950 website by ____. Describes roles of project manager, tech lead and Anomaly chair; including reporting and test results. 2.2 Dept. roster includes PMO updated to reflect new employees. 3. PMO begins to facilitate Anomaly tracking meetings and effectively manage the AT process. 4.1 Release training to TEDS and add to course curriculum for appropriate organizations by ____. 4.2 X% of SEEs receive training by ____. 4.3 Y% of system/component engineers trained by ____.	1. WFS # assigned and visually located. 2.1 Visually inspect 2950 website. 2.2 Verify additional staff are included in dept. roster. 3. Review meeting minutes, track budget costs and scorecards. 4. Visually inspect TEDS curriculum catalog of courses.	**Assumptions to produce Outcomes:** 1. Management champions committed to process. 2. Staff available and management approves budget and process approved. 3. Staff want to be trained; management supports training; and corporate training will help implement training.

Inputs: *How team will produce Outcomes*	1. Who's Responsible	2. Other Persons Involved	3. Complete by Date	4. Resources Required	5. Information Needed	6. Information Needed	7. Comment
Activities:							
1. New Anomaly Tracking (AT) Process Released.							
1.1 Develop a standard for reporting requirements for dismissing an anomaly.							
1.2 Develop and implement anomaly review board w/defined roles.							
1.3 Develop a preliminary investigation process/criteria w/timelines capability to report and escalate.							
1.4 Define and implement standard requirements for opening documents.							
1.5 Define content and threshold of Project Plan (include risk management and movement of hardware).							
2. PMO Created and Staffed.							
2.1 Identify PMO requirements.							
2.2 Define roles and responsibilities of key staff.							
2.3 Announce organization.							
3. PMO Launched.							
4. AT Process-Training Program Developed and Released.							

Design and Launch Sales or Marketing Initiatives
(Avemar Cancer Treatment in Thailand)

This case study describes how an international consortium planned to expand sales of a cancer-fighting nutrient to provincial areas in Thailand.

Virtually every organization needs to expand sales, increase customers, or open new distribution channels. BioMedicare, Inc. is a joint venture company with Hungarian, Korean, and Thai partners. The Thai partners are the sole distributor in Thailand. Their focus is on distributing Avemar, a medical nutrient proven effective in fighting cancer. The company also funds substantial clinical research in various medical schools and hospitals around the world.

After establishing strong sales operations in Thailand's capital city of Bangkok, and in other large cities, they needed to expand sales into provincial areas. This required a well-trained sales force and a program for educating doctors. This LogFrame shows their plan for rolling out the product to rural provinces.

Logical Framework for
Expanding Sales of Avemar Cancer Treatment in Thailand

Objectives	Success Measures	Verification	Assumptions
Goal: To promote quality of life by Avemar to cancer patients nationwide.	**Goal Measures:** 1. Prescribed numbers nationwide increased by 20% in current year. 2. Product achieves 15% market share in 3 years.	1. Market Report and Analysis Market Report 2. Sales Report	**Assumptions to reach Goal:** 1. No economic crisis. 2. No breakthrough medical method of curing cancer. 3. Quality of product to meet proven medical benefits contribute as promised.
Purpose: To achieve greater number of satisfied customers nationwide.	**Purpose Measures:** 1. Within next year, 100% sales increase in target provincial areas; 5% increase in existing areas. 2. Customer satisfaction increased from 80% to 95% satisfaction.	1. Sales Report 2. Customer Survey	**Assumptions to achieve Purpose:** 1. No serious blame on the product in public. 2. Existing oncologist accounts still believe in and continue to prescribe our product. 3. Customers appreciate new support and service.
Outcomes: 1. Promotional materials developed and published. 2. Prospects introduced in target provincial areas. 3. Sales revenue from existing accounts maintained. 4. Sales force strengthened. 5. Customer support programs introduced.	**Outcome Measures:** 1. Includes information brochures, materials for both doctors and patients. 2. Minimum of 500 doctors are newly introduced to product and its benefits through personal contact from Reps. 3. 5% sales deviation from existing accounts. 4. By Jan 31, new salespeople hired and trained by experts. Training covers product's detail and selling technique. 5. Programs include medical advice, online and toll-free ordering.	1. Visual Review 2. KPI Report 3. Sales Report 4. Customer Survey 5. Assessment and Test results	**Assumptions to produce Outcomes:** 1. Clinical data are proven and available to public. 2. Information and data on prospects are available and accurate. 3. Sales reps do their job. 4. Adequate number of sales reps. 5. Training material and facility are in place.

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Inputs: How team will produce Outcomes			Month												Assumptions for Inputs:
Action Steps	Responsible	Resources (BHT)	1	2	3	4	5	6	7	8	9	10	11	12	
1. Promotional materials developed and published															1. Editing is completed by Jan 15.
1.1 Print 2nd edition handbook.	Jumpol	50,000		*											
1.2 Develop new brochure.	Nathapol	20,000		*											2. Well-identified prospects.
1.3 Create new discount coupon.	Nathapol	5,000	*												
2. Prospects in target provincial areas introduced															3. Sales reps understand product.
2.1 Identify and select prospects in general hospital.	Tony		*												
2.2 Meet prospects and introduce product effectiveness,	Sales rep.			*	*	*	*	*	*	*	*	*	*	*	
2.3 Deliver handbook and brochure.	Sales rep.	100,000		*	*	*	*	*	*	*	*	*	*	*	4. Management approves budget by Dec. 31.
2.4 Arrange monthly meeting by a seminar with prospects.	Dr. Kumpo & Dr. Banjob	1,000,000	*	*	*	*	*	*	*	*	*	*	*	*	
3. Sales revenue from existing accounts maintained															5. Sales reps have ability to reach prospects or customer in person.
3.1 Increase time table and frequency of visit.	Sales rep		*	*	*	*	*	*	*	*	*	*	*	*	
3.2 Remind about product effectiveness and update news or latest improvement.	Sales rep		*	*	*	*	*	*	*	*	*	*	*	*	
4. Sales force strengthened															6. Dr. Nayada devotes necessary time.
4.1 Recruit five new sales reps to be responsible for target area.	Nuna	1,500,000 1st year	*												7. Sales reps are trainable and willing to sell the product.
4.2 Train sales reps on product knowledge, selling technique, etc.	Dr. Nayada and Tony		*												8. Dr. Kumpol and Dr. Banjob available at every seminar.
5. Customer support programs made															9. Online ordering is working and secured.
5.1 Medical supportive calls.	Dr. Nayada		*	*										*	
5.2 Install toll-free number.	Nathapol	30,000	*												
5.3 Install online ordering.	Nathapol	10,000			*										
5.4 Offer rebate discount coupon.	Sales rep	2% of sales						*						*	
	Total	x baht													

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Close Out Projects with a People Focus
(Washington Department of Transportation)

Project closure requires not only wrapping up the documentation at project end but also helping team members transition to new positions. This project plan from the Washington State Department of Transportation (WSDOT) was developed three years ahead of the planned completion of a major bridge construction project.

The Hood Canal Bridge Project Team was established to administer the construction of this major project in Washington State. The employees served in project positions, which means that they would go back to other positions within the organization when work is completed. Project leadership made a commitment to find positions for both state and consultant employees that would benefit their careers. They would also be closing several work sites, including vacating office space and disposing of equipment and vehicles at different times as the work at each site wraps up. There is also extensive documentation to complete for both the state and federally funded work.

"Finish Strong" is a project plan to take care of the people by lining up good positions for 60 employees spread over several sites after this project finishes. Even though scheduled completion was three years away, using a LogFrame early helped to identify tastes necessary to ensure smooth execution.

Logical Framework for
Hood Canal Bridge Project Closure "Finish Strong"

Objectives	Success Measures	Verification	Assumptions
Goal: Effectively care for our Team employees and physical assets through the project closure process.	**Goal Measures:** 1. Employees stay with the project until reassigned per the employee database. 2. No cost for assets we are finished using.	1. Per the employee database. 2. Per the finance report.	**Assumptions to reach Goal:** 1. Employees accept the closure plan. 2. Employees participate in the plan. 3. Accessible assets available elsewhere in state govt.
Purpose: Successfully close out the project in accordance with state and federal regulations to the benefit of our employees.	**Purpose Measures:** 1. Region approval of all documentation. 2. FHWA approval of all documentation. 3. 75% of all employees in career-enhancing positions per the employee database.	1. Region approval letter received. 2. FHWA approval letter received. 3. Match reassignment results to employee database.	**Assumptions to achieve Purpose:** 1. Region staff available to process packages in a timely manner. 2. FHWA reviews the submittals in a timely manner. 3. Employees communicate changing career goals. 4. Acceptable positions available when needed.
Outcomes: 1. Complete all documentation required for project closure.	**Outcome Measures:** 1a. All packages completed on time per project documentation checklist. 1b. All documents properly achieved on time or properly distributed on-time per documentation schedule. 1c. All documents properly distributed on time per the documentation schedule.	1a. Project documentation schedule. 1b. Documentation checklist.	**Assumptions to produce Outcomes:** 1a. Project employees remain with the team until planned transition date. 1b. Any changes in documentation requirements are communicated to the project office.
2. Reassign all project staff in a manner that supports project delivery.	2a. Workforce budget meets baseline in accordance with the finance plan timelines. 2b. Changes in employee status occur within 30 days of workforce planning tool date.	2a. Finance Report. 2b. Employee Database. 2c. Workforce planning tool.	2a. Project employees remain with the team until planned transition. 2b. Employees contribute to database setup. 2c. Employees communicate desired changes to database in a timely manner.
3. Decommission facilities and equipment.	3a. No costs incurred for office space 30 days after it is vacated. 3b. No costs incurred for unused equipment 30 days after it is no longer needed on the project.	3a. Finance Report. 3b. Finance Report.	3a. Real Estate Service has staff and funding available to manage property disposal. 3b. Regional stores have staff and funding to work disposal issues.
4. Communicate the plan to employees and region managers through project closure.	4a. Closure plan update newsletter sent out quarterly.	4a. Newsletter sent on schedule.	4a. Project staff available.

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Inputs: How team will produce Outcomes

Action Steps:	Responsible	Resources	Schedule (in weeks, months, etc.)	Assumptions for Inputs:
1. Complete all documentation required for project closure.				
1.1 Determine Federal requirement for documentation	Danks			
1.2 Build documentation database	Danks			
1.3 Compile documents required	Danks			
1.4 Complete document packages for Regions	Danks			
1.5 Complete document packages for FHWA	Danks			
1.6 Transmit document packages	Danks			
2. Reassign all project staff in a manner that supports project delivery.				
2.1 Develop questionnaire	Ireland/Cutler			
2.1.1 Consult HR	Ireland/Cutler			
2.1.2 Draft questions	Ireland/Cutler			
2.1.3 Review questions with managers	Ireland/Cutler			
2.1.4 Finalize questionnaire	Ireland/Cutler			
2.2 Present questionnaire to all staff	Soderquist			
2.3 Develop Employee database	Melchior			
2.4 Populate employee database based on questionnaire information	Melchior			
2.5 Consult with Region Managers on future employee opportunities	Ireland/Moon			
2.6 Consult with Parametrix on future employee opportunities	Cutler			
2.7 Match opportunities to employee career goals	Melchior			
2.8 Meet with employees to discuss results	Soderquist			
2.9 Develop training plans as required	Manager			
2.10 Monitor database for employee changes	Manager			
3. Decommission Facilities and Equipment.				
3.1 Vacate facilities				
3.1.1 Generate summary project schedule for facilities and equipment use	Danks			
3.1.2 Overlay facilities onto summary schedule	Danks			

Team Conduct of Operations
(Los Alamos National Laboratory—Geographic Information Service)

As described in Chapter 4, the Los Alamos National Laboratory's Geographic Information Service (GIS) conducted a unit level strategic plan, and identified eight necessary improvement initiatives.

The LogFrames that follows presents the plan for Team Conduct of Operations. The Team Improvement LogFrame can be found on our web site.

Logical Framework for
GIS Team Conduct of Operations

Objectives	Success Measures	Verification	Assumptions
Goal: GIS-related activities are conducted in a manner that demonstrates to customers a high level of excellence.	**Goal Measures:** 1. X% of customers satisfied with high quality, quick turn-around deliverables.	1. Customer survey.	**Assumptions to reach Goal:** 1. Different GIS functions and staff will collaborate on setting the standard.
Purpose: Products/Services are consistent, cost-effective, high quality, and delivered with increased productivity.	**Purpose Measures:** 1. Services meet agreed quality specs. 2. 100% of team members using procedures by 3/1. 3. 100% of projects using procedures by 3/1. 4. Improve work productivity by 30% by 12/1.	1. Check. 2. Conduct annual audit. 3. Management walk-arounds. 4. Compare annual productivity changes.	**Assumptions to achieve Purpose:** 1. Staff cross-trained and versatile. 2. GIS staff willing to put effort into achieving conducts of operations program. 3. Management has 100% of valid metrics necessary to justify budget. 4. Formality of operations increases productivity. 5. Workload can be prioritized to allow for development of processes/procedures.
Outcomes: 1. Processes/procedures to be included are selected. 2. Have agreed-upon standards and regulations. 3. Process and procedures are written. 4. Alternative models/test practices reviewed. 5. Team metrics identified. 6. Tools/procedures are selected. 7. Team members are trained in procedures.	**Outcome Measures:** 1. List of agreed-upon procedures completed by 10/17. 2. Best Management standard and guidelines identified and adopted by 11/20. 3.1 Develop Quality Assurance Procedures (QAP) by 6/1. 3.2 Develop procedure template by 10/4. 3.3 Procedures completed and approved by management by 3/1. 4. Business models reviewed, applicable one selected and adopted by 12/19. 5. Metrics defined and in place by 4/1. 6. Tools/procedures reviewed, modified if necessary, and adopted by 3/1. 7. Team-procedure training conducted and documented by 4/1.	1. Completed list. 2. Adopted standards and guidelines. 3.1 Completed QAP. 3.2 Completed template. 3.2.1 Completed procedures. 3.3 Procedures completed and approved by management. 4. Selection of business model completed. 5. Metrics completed. 6. Tools/procedures in place. 7. Training reviewed for completeness.	**Assumptions to produce Outcomes:** 1. GIS staff wants Conduct of Operations to exist. 2. Improved staff communication and coordination occurs. 3. Best management practice standards and guidelines are available in all areas. 4. Division funds activities. 5. Procedures will be updated as processes change.

Inputs: *How team will produce Outcomes*	Responsible	Resources	Schedule (in months)												Assumptions for Inputs:
Action Steps:			Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	
1. Processes/ procedures to be included are selected.															
1.1 List/identify processes.				|											
1.2 Review processes for effectiveness.				|											
1.3 Select process for Conduct of Operations.				|											
2. Have agreed-upon standards and regulations.															
2.1 Review standards and regulations.				|											
2.2 Select standards and regulations.				|											
3. Processes/procedures are written.															
3.1 Develop QAP.			|							|					
3.2 Develop procedure template.			|												
3.21 Write procedures.					|		|								
3.3 Team reviews procedures.							|								
3.4 Management reviews and completes procedures.							|								
4. Alternative models/test practices reviewed.															
Etc.															

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Our company store offers a variety of learning aids, LogFrame grids, electronic templates, wall posters, and other support tools at *www.ManagementPro.com.*