



Program Evaluation Tool



Tips & Resources



Step 1 - Select Evaluation Team



Select Evaluation Team

- Ensure the evaluation team is not too large to handle (3 to 5 people is ideal).
- Stakeholders lacking time to participate on the evaluation team can still play a role:
 - Review the initial evaluation plan
 - Pilot test the data collection tools
 - Review a draft of the evaluation report
 - Discuss the evaluation recommendations
- Methods to involve stakeholders include:
 - Send drafts for feedback through email
 - Survey key stakeholders for their feedback
 - Develop a subcommittee/work team or advisory group
- Team members may need to sign a confidentiality agreement stating they will not share information with anyone outside of the evaluation team. This is important if data will be collected from human participants

Evaluation Specialists

- The approximate costs¹, in Canadian dollars, for evaluation specialists are:
 - Evaluation consultant - \$600/day to \$1400/day
 - Evaluation coordinator - \$300/day to \$500/day
 - Evaluation assistant - \$150/day to \$250/day
- Assigning an individual or a consultant to have primary responsibility for coordinating the evaluation helps to ensure the evaluation is completed in a comprehensive and timely manner.
- Methods to find an evaluation consultant:
 - Post a request for proposals (RFP)
- Invite specific consultants or co-workers you have previously worked with
- Hiring an evaluation consultant is a similar process to hiring an employee²:
 - Review the resume – Does he/she have experience evaluating similar programs?
 - Contact references (*i.e. managers of programs evaluated by the consultant*)
 - Interview the candidate

¹ Rush, B. (2007). Feasibility Assessment of Outcome Evaluation for Local Health Promotion and Prevention Community Programs.

² Juvenile Justice Evaluation Center (2001). Hiring and working with an evaluator. Washington, D.C.: www.jrsainfo.org/pubs/juv-justice/evaluator.pdf

- Ask for samples of the evaluator's work (*program logic models, evaluation framework/plan, evaluation reports*)

Suggested Work Plan for Team Meetings (See *Evaluation 101: Step 1*)

- Ensure meetings are productive by creating and circulating an agenda in advance. Include all relevant documents (*e.g. draft evaluation plan, program logic model*).
- Identify a chair by discussing the role and the function of the chair with your team then thinking about the strengths of each member to identify who can best fulfill this role. Chair responsibilities include:
 - Conducting the meeting
 - Motivating participation during the meeting
 - Ensuring the meeting works through the agenda in a timely manner
- Identify a minute-taker to record the meeting. Minutes can be used as:
 - Reference for any future misunderstandings
 - Notes to team members unable to attend the meeting
 - Reminder of the action items, next steps and decisions agreed to at the meeting.
- Develop a Terms of Reference outlining:
 - Purpose of the evaluation
 - Evaluation team members and their roles
 - Timeframe for the entire evaluation process
- Send minutes of the meeting to absent team members and invite their feedback.
- Consider different meeting methods to increase attendance (*e.g. teleconference*)



Select Evaluation Team

- The Health Communications Unit developed a Stakeholder Participation Wheel to help identify stakeholders who are core, more involved and peripheral. The Stakeholder Participation Wheel can be found in their Introduction to Health Promotion Program Planning workbook (pg. 15), available at www.thcu.ca/infoandresources/publications/Planning.wkbk.content.apr01.format.0ct06.pdf
- An example of a confidentiality statement can be found at iris.uwaterloo.ca/ethics/human/application/SampleSupportingMaterials.htm

Evaluation Specialists

- Requests For Proposals (RFPs) can be posted through the:
 - Canadian Evaluation Society (www.evaluationcanada.ca/)
 - Ontario Health Promotion E-Bulletin (www.ohpe.ca/)
 - Charity Village (www.charityvillage.com/)

- The Business Library provides Requests For Proposals templates which can be found at www.thebusinesslibrary.com/lib/specialresources/temprfp.php
- The Financial Management Board Secretariat, Government of the Northwest Territories developed a practical guide to working effectively with an evaluation consultant which includes a discussion in Section B, Finding and choosing your evaluation consultant, and a sample decision-making framework. This guide can be found at www.fin.gov.nt.ca/documents/forms-documents/consultantguide.pdf
- My Environmental Education Evaluation Resource Assistant (MEERA) provides information and lists other excellent resources on finding and working with an evaluator at meera.snre.umich.edu/plan-an-evaluation/plonearticlemultipage.2007-10-30.3630902539/finding-working-with-an-evaluator

Suggested Work Plan for Team Meetings

- The Imperial College Union provides hints on how to chair a meeting effectively: www.union.ic.ac.uk/resource/skills/chair.html
- Hints on how to be an effective member of a meeting can be found at: www.union.ic.ac.uk/resource/skills/meetings.html
- Meeting Wizard provides tips and guidelines to create effective meetings (scheduling s, agendas, chairing, taking minutes, ice breakers, scheduling software, and team building) (www.meetingwizard.org). Free online scheduling software saves time setting up meetings and increases the likelihood that all members will attend the meeting.
- UNESCO outlines guidelines for developing terms of reference for evaluations: portal.unesco.org/es/ev.php-URL_ID=24293&URL_DO=DO_TOPIC&URL_SECTION=201.html

Step 2 - Assess Organizational Capacity & Resources for Evaluation



Determine Evaluation Resources

Methods to contain evaluation costs include:

- Seek internal evaluation champions for your evaluation team who can contribute their expertise to direct any part(s) of the evaluation process.
- If you must hire outside evaluation expertise, determine how many days you can afford such assistance (*see approximate costs for evaluation specialists outlined in Step 1 - Tips & Resources*).
- Use in-kind resources (*e.g. program staff for data collection or data entry*).
- Ask stakeholder members on the evaluation team if they have access to resources from their organizations (*e.g. time or expertise*).
- Seek graduate students. Some post-graduate programs require completion of a student practicum placement. Determine student placement requirements ahead of

time, including the learning objectives students need to achieve to get the credit and the timelines for the placement.

- Train staff to use Microsoft Excel for simple data analysis.



Develop a Common Understanding of Evaluation

- Public Health Agency of Canada: Program Evaluation Toolkit (www.phac-aspc.gc.ca/php-ppsp/toolkit-eng.php)
- The Health Communication Unit: Evaluating Health Promotion Programs Workbook (www.thcu.ca/infoandresources/publications/EVALMaster.Workbook.v3.6.08.15.07.pdf)
- W.K Kellogg Foundation Evaluation Handbook (www.ojp.usdoj.gov/BJA/evaluation/links/WK-Kellogg-Foundation.pdf)

Determine Evaluation Resources

- A list of Master Degree Programs with a practicum placement can be found at www.phac-aspc.gc.ca/php-ppsp/master_of_php-eng.php

Step 3 - Develop Program Logic Model



- Dr. Brian Rush's Workshop for the TEIP Communities on Logic Models (teip.hhrc.net/docs/workshops/06Feb24BrianRushLogicModelPresentation.pdf)
- W. K. Kellogg Foundation: Logic Model Development Guide (www.wkkf.org/Pubs/Tools/Evaluation/Pub3669.pdf)
- The Health Communication Unit: Online Health Program Planner (www.thcu.ca/ohpp)
- Public Health Agency of Canada: Program Evaluation Toolkit (www.phac-aspc.gc.ca/php-ppsp/toolkit-eng.php)

Step 5 - Build Evaluation Framework



Indicators

Conceptual/theoretical frameworks exist to guide selection or development of indicators.

- **Kirkpatrick's four-level model** (coe.sdsu.edu/eet/Articles/k4levels/index.htm) is useful when developing indicators for a training/education program. For example, you may want to develop indicators that measure:
 - How participants react to the training
 - Change in participants' knowledge, skills and attitudes
 - Change in the participants' behaviours



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- **Uptake of evidence-informed practices** - Kelly Skinner and others' "levels-of-use" model (www.phr.uwaterloo.ca/pubs/169-public-2007-10-03-329391.pdf)
- **Roger's Diffusion of Innovation** (www.rogerclarke.com/SOS/InnDiff.html).
- **Effectiveness of partnership** – Office of the Deputy Prime Minister's Strategic Partnership Taskforce's Partnership Assessment Tool (www.communities.gov.uk/publications/localgovernment/assessingstrategicpartnership)
- **Community Capacity** – Goodman RM et al. Identifying and defining the dimensions of community capacity to provide a basis for measurement. *Health Education and Behaviour*, 1998. 25(3): p. 258-278.
- A summary of health promotion theories can be found in TEIP's *Program Assessment Tool* (teip.hhrc.net/tools/assessment_tool.cfm).

Data Collection Strategy

- Use multiple searching methods to locate existing data collection tools:
 - Post an inquiry on a listserv
 - Ask your colleagues, practice networks and known evaluation specialists
 - Search the web
 - Contact program coordinators/staff from other organizations who work in a related field
- Collect both quantitative and qualitative evaluation data in order to obtain a fuller picture of your program's impact.
 - Quantitative data will tell you what change and the magnitude of the change
 - Qualitative data will provide you with more in-depth information and will tell you why and how the changes occurred
- Pilot test data collection tools to assess readability, comprehension and cultural sensitivity for your intended audience.
 - Ask individuals representing the intended audience or someone who works closely with the intended audience to complete the data collection tool. Ask them to document any questions that were unclear, insensitive and/or any questions they thought should have been asked.
- An evaluation specialist can assist in developing or providing feedback on data collection methods.
 - Within your organization, an experienced epidemiologist or an individual with experience in developing data collection tools can provide feedback.
- Ensure your data collection method is **ethical**
 - The benefits must outweigh the risks
 - Be certain that no personal health information is revealed
 - Ensure questions are asked in a non-stigmatising, non-threatening way

- There should be no element of coercion
- Make results of the evaluation available to participants after the study
- Give participants the choice to not participate or to withdraw their participation at any time without repercussion

Methods of Data Analysis – See *Step 7 – Tips for Data Analysis*



Indicators

- The Heart Health Resource Centre (www.hhrc.net/pubs/skills/objective_indicators.pdf)
- Public Health Agency of Canada: Program Evaluation Toolkit (www.phac-aspc.gc.ca/php-ppsp/toolkit-eng.php)
- The Health Communications Unit provides consultative services on developing indicators (www.thcu.ca)

Sources of Health Promotion Indicators

- Health Canada website (search “indicators”) (www.hc-sc.gc.ca)
- US Healthy People 2010 Local Health Indicators (www.healthypeople.gov/LHI)
- Canadian Council on Social Development (www.ccsd.ca)
- Canadian Tobacco Control Research Initiative (Indicators for smoking cessation) (ctcri.ca/en/index.php?option=com_content&task=view&id=30&Itemid=49)
- Federation of Canadian Municipalities Quality of Life Reporting System (www.fcm.ca)
- Association of Public Health Epidemiologists in Ontario (APHEO) (www.apheo.ca)
- Health Evidence Network (www.euro.who.int/Document/E88086.pdf)
- Victoria, Australia – Community Health Promotion Indicators (www.communityindicators.net.au/measuring_wellbeing)
- National Centre for Chronic Disease Prevention and Health Promotion (apps.nccd.cdc.gov/cdi/)

Evaluation Design and Data Collection

- Project STAR developed a Study Designs for Program Evaluation document which can be found at www.nationalservicerresources.org/files/legacy/filemanager/download/performance_Measurement/Study_Designs_for_Evaluation.pdf
- The Ohio State University developed an Evaluation Handbook that lists the different methods of data collection on page 17 of the document (step 4) which can be found at ohioline.osu.edu/b868/pdf/b868.pdf



Program Evaluation Tool

Quantitative Data Analysis

- **Descriptive Analysis**
 - Taylor-Powell, E. (1996). University of Wisconsin Extension Program, Development and Evaluation Unit. (learningstore.uwex.edu/pdf/G3658-6.pdf)
- **Inferential Analysis**
 - Trochim, W. K. (2006). Research Methods Knowledge Base: Inferential Statistics. This document provides information on different types of inferential analysis. (www.socialresearchmethods.net/kb/statinf.htm)
 - Texas State Auditor's Office. Methodology Manual. This document provides information on when to use inferential analysis, how to prepare the data, and information on the advantages and limitations of this type of analysis. (www.preciousheart.net/chaplaincy/Auditor_Manual/20inferd.pdf)

Data Collection Tools

- Survey Monkey is a software program that provides you with a survey editor you can use to create a survey using your web browser. This program also has collection features (e.g. *participants can complete the survey online*) and analysis features (e.g. *summarizes results*). The basic account is free and upgrades can be purchased. (www.surveymonkey.com)
- Public Health Agency of Canada. Guide to Project Evaluation: A Participatory Approach. This resource examines various data collection methods and tools for public health program evaluation. (www.phac-aspc.gc.ca/ph-sp/resources-ressources/guide/index-eng.php)
- The Online Evaluation Resource Library offers a resource entitled Quality Criteria for Instruments. This resource offers guidelines to creating or identifying sound project evaluation instruments. (oerl.sri.com/instruments/instrcrit.html)
- Taylor-Powell, E. & Steele, S. (1996). University of Wisconsin Extension Program, Development and Evaluation Unit. Collecting Evaluation Data: Direct Observation. This resource offers guidelines on performing an observation data collection method and provides examples on the related data collection tools. (learningstore.uwex.edu/pdf/G3658-5.pdf)
- W.K. Kellogg Foundation. Data Collection. This resource provides information on points to consider when choosing a data collection method. (www.wkkf.org/Default.aspx?tabid=90&CID=281&ItemID=2810016&NID=2820016)
- The Health Communication Unit provides a Conducting a Focus Group Workbook. (www.thcu.ca/resource_db/pubs/982989842.pdf)
- The Community Tool Box provides information on conducting surveys. (ctb.ku.edu/tools/sub_section_main_1048.htm)

- Corporation for National & Community Services provides information on eleven ways to improve data collection.
([nationalserviceresources.org/files/legacy/filemanager/download/performanceMeasurement/11 Ways to Improve Data Collection AC.pdf](http://nationalserviceresources.org/files/legacy/filemanager/download/performanceMeasurement/11%20Ways%20to%20Improve%20Data%20Collection%20AC.pdf))
- Performance Monitoring and Evaluation, TIPS, USAID Center for Development Information and Evaluation, Conducting Key Informant Interviews, 1996, Number 2. This recourse provides information and steps in conducting key informant interviews. (pdf.dec.org/pdf_docs/PNABS541.pdf)
- Penn State University, College of Agricultural Sciences, Cooperative Extension & Outreach, Program Evaluation website offers information on multiple data collection methods and examples of data collection tools.
(extension.psu.edu/evaluation/data.html)

Step 7 - Collect & Analyze Data



Data Collection

- Ensure the person administering the data collection tool is skilled in the method chosen for your evaluation plan.
- Participants should not be pressured or made to feel uncomfortable when participating in a program evaluation.
- When collecting multiple data sets over time, enter the data into a spreadsheet (*e.g. excel sheet*) as soon as data is received.
- Fewer data entry errors occur when data is entered in small batches
- Add an identification number to each data collection tool, participant, group or data collection session.
 - Identification numbers help to keep track of the source of the raw data

Data Analysis

- Write the purpose of the evaluation and the evaluation questions on a sticky note and stick it on your computer screen where you can see it at all times as you analyze the data.
- On the master copy of the data collection tools in the margin write down the method of data analysis that will be used for each question.
- To reduce evaluator bias, have someone outside the program analyze the data and compare your results. Ensure that they have signed a confidentiality agreement.



Program Evaluation Tool

Quantitative Data Analysis³

- **Code the data and input into a spreadsheet, database or statistical program.**
 - Develop a master coding sheet that identifies the codes used for each question of your data collection tool.
 - Assign numerical values to participants' answers. This provides easier analysis when using a software program. For example:
 - Code data as No = 1 and Yes = 2.
 - A "no" response is input into the spreadsheet as "1".
 - The percentage of participants who respond "no" is easily calculated.
 - Numerical responses (*e.g. age, minutes physically active/day*) are entered into the spreadsheet as is.
 - Code blank responses using a number that does not appear in other coding (*e.g. 99*)
- **Check for errors before data entry and double check data entry.** Look for:
 - Inconsistent data (*e.g. age stated as 56 and year of birth as 1983*)
 - Answers outside the range of codes (*e.g. 8 for a 1-5 response option*)
 - Out of the ordinary answers (*e.g. a participant states that they smoke 1000 cigarettes/day*).
- **Two people enter the data separately and results are compared.**
 - If data is entered into Microsoft Excel, merge the two workbooks and look for differences.
- **Do random spot checks of the data**
 - An individual who did not enter the data searches for incorrectly entered data by comparing random sections of the data entered with the raw data.
 - Look for errors such as transposed numbers (*e.g. 1.56 instead of 1.65*).

Qualitative Data Analysis

- **Organize and code the data:**
 - Write key points on Post-its or index cards and group them into themes.
 - Document themes and information in a table in Microsoft Word or Excel.
- **Two heads are better than one.**
 - Engage at least two individuals to analyze the data independent of each other to compare themes and to ensure the important themes are highlighted. This will strengthen the findings.
- **Select quotes to illustrate each theme**

³ Offord Centre for Child Studies (2004). Working through the Data: Step 6.
www.offordcentre.com/rsd/hac/report/06-5.html

- **Read, analyze and repeat.**
 - It may take several reviews of analyzing the data to identify key themes, patterns or insights.



Software Programs for Data Analysis

(\$ = need to purchase software program, F = free software program)

Caution: When choosing a software program consider the issue of privacy (i.e. security of the data)

Quantitative data analysis software programs include:

- **SPSS** (Statistical Package for the Social Sciences) (www.spss.com) \$
- **SAS** (Statistical Analysis Software) (www.sas.com/technologies/analytics/statistics/stat/index.html) \$

Qualitative data analysis software programs include:

- **AnSWR** (www.cdc.gov/hiv/topics/surveillance/resources/software/answr/index.htm) F
- **EZ-Text** (www.cdc.gov/hiv/topics/surveillance/resources/software/ez-text/index.htm) F
- **Survey Monkey** is a software program that can assist you with data collection and analysis. The collection features include the creation of a weblink to your survey, ability to track who responds to your survey and send follow-up reminders, and the option of setting collection restrictions. The analysis features include the ability to view a summary (quantitative analysis) of the responses, download your responses into a spreadsheet, and save results as a PDF. (www.surveymonkey.com) F \$

Step-by-step Instructions

- **Relatively simple data analysis** can be done through **Microsoft Excel**: Leahy, J. (2004). University of Wisconsin Extension Program, Development and Evaluation Unit. (learningstore.uwex.edu/pdf/G3658-14.pdf)
- **Analyzing qualitative data:**
 - Taylor-Powell, E. and Renner, M. (2003). University of Wisconsin Extension Program, Development and Evaluation Unit (learningstore.uwex.edu/pdf/G3658-12.PDF)
 - The International Development Research Centre. Module 6: Qualitative Data Analysis. (www.idrc.ca/en/ev-106563-201-1-DO_TOPIC.html). In addition to step-by-step instructions, this module provides information on how to choose a software program to use.

Data Analysis

- My Environmental Education Evaluation Resource Assistant (MEERA) provides information and a list of resources on analyzing data (meera.snre.umich.edu/plan-an-evaluation/plonearticlemultipage.2007-10-30.4643560864/step-6-analyze-data)
- Trochim, W. K. (2006). Research Methods Knowledge Base. This resource provides information on data analysis concepts and methods. (www.socialresearchmethods.net/kb/analysis.php)

Quantitative Data Analysis

- Texas State Auditor's Office. Methodology Manual. This document provides information on how to prepare data for an inferential quantitative data analysis. (www.preciousheart.net/chaplaincy/Auditor_Manual/20inferd.pdf)
- Minter, E. & Michaud, M. from the University of Wisconsin Extension Program Development and Evaluation Unit developed a document called 'Using Graphics to Report Evaluation Results'. This document explains why you should use graphics, examples of different types of graphics and when to use them. (learningstore.uwex.edu/pdf/G3658-13.PDF).

Qualitative Data Analysis

- Frechtling, J. and L. Sharp, (1997). National Science Foundation. This document provides qualitative advice on completing a qualitative data analysis. (www.nsf.gov/pubs/1997/nsf97153/chap_4.htm)

Step 8 - Document Evaluation Report



When developing recommendations:

- **Be realistic** - consider limiting factors, such as budget, which can act as barriers to implementing the recommendations
- **Stakeholders can provide useful insight** on what is realistic and effective given the limited resources and the context of the community you are working with.
- **Focus on quality rather than quantity** – a few recommendations with a large potential impact is preferable to many recommendations with little anticipated impact.
- **Be specific** – explain your rationale for recommending change and how it will enhance the program. Link these changes to your evaluation results.

- **Search the evidence for suggestions to enhance your program.**
 - The *TEIP Program Evidence Tool*⁴ can be a source of support for your journey through evidence.
- **Examine process objectives separately from outcome objectives**
 - *Process objectives* consider the impact of how activities were implemented
 - *Outcome objectives* consider the impact of program components on intended outcomes

Step 9 - Disseminate Findings & Modify Program



When developing your messages remember:

- **Keep it relevant and action oriented** – tell stakeholders how the results relate to the actions and decisions that need to be made.
- **Keep it short and sweet** – tell the stakeholders only what they need to know.
- **Grab their attention** – outline the most important information first and present the information in a format that is attractive and matches the stakeholders’ style.
- **Keep them informed** – provide key stakeholders with updates throughout the evaluation process with interim reports.
- **Tailor your communication style** for each stakeholder. For example, giving a presentation at a community meeting can be an effective method to disseminate findings to your intended audience. A poster presentation at a conference can be an effective way to disseminate findings to researchers.
- **Communications options include** (*but are not limited to*):
 - Posting on listservs
 - Presentations at conferences (*i.e. provincial or national Public Health Association annual conferences*) or community meetings
 - Publishing a peer-reviewed journal article
 - Writing newsletters, technical reports or news releases
- **Post your Evaluation Report online** (*e.g. Canadian Best Practices Portal*).



Develop Dissemination Messages

- The Community Toolbox provides information in the section titled “How Do You Communicate Your Evaluation Findings” at ctb.ku.edu/tools/en/sub_section_main_1376.htm

⁴ Towards Evidence-Informed Practice (2008). TEIP Program Evidence Tool. teip.hhrc.net/tools/tools_evidence.cfm