

Making the Most of Your Action Plans

*Tools and techniques for monitoring
and evaluating your Public Health
Improvement Plan*

Evaluation: what is it?

Systematically collecting and analyzing data to answer:

- Did we succeed? Did we achieve the goals we set out to?
- What went well? What did we do right?
- What were the challenges?
- What improvements should we make and how?



Evaluation: What does it look like?

*Measuring quantities &
counting*

QUESTIONNAIRES & SURVEYS

Focus groups

Cross-sectional research

A: It depends!
But is always
involves
collecting data

Collecting stories

Peer review

PRE-POST TESTING

Key informant interviews

IMPACT ASSESSMENT

Measuring quality

*Benchmarking or
comparing*

OBSERVING

Evaluation: What does it look like?

- The best combination of data sources to answer your questions
- Does NOT have to include complex, expensive data collection
- But SHOULD be as objective and comprehensive as possible
- Triangulation: using more than one data source to see if different methods lead to the same result

Activity & Group Discussion

- Individually match each of these evaluation methods with their descriptions.
- While doing this consider:
 - What are we already doing in our work?
 - What could we easily add?
 - What methods would be easy or hard to implement?

MEASURING QUANTITIES & COUNTING

measurements that provide numbers, for example height or weight

Cross-sectional research

observation of a population, or a sub-set of it, at one specific point in time

Peer review

evaluation of a policy or project by an objective person of similar competence

KEY INFORMANT INTERVIEWS

loosely structured conversations with people knowledgeable about what you want to evaluate

Measuring quality

measurement that provides estimate of a particular attribute, characteristic, standard or degree

Observing

measurement taken by observing and recording phenomena without the researcher intervening

Impact assessment

a method to assess or evaluate the impact of a policy or project on the intended population

BENCHMARKING OR COMPARING

evaluation by comparing with a standard; could be a previous achievement or a 'gold standard'

Pre-post testing

comparing measurements taken at two or more different time points

Collecting stories

an ethnographic measure to compile anecdotes without imposing research bias

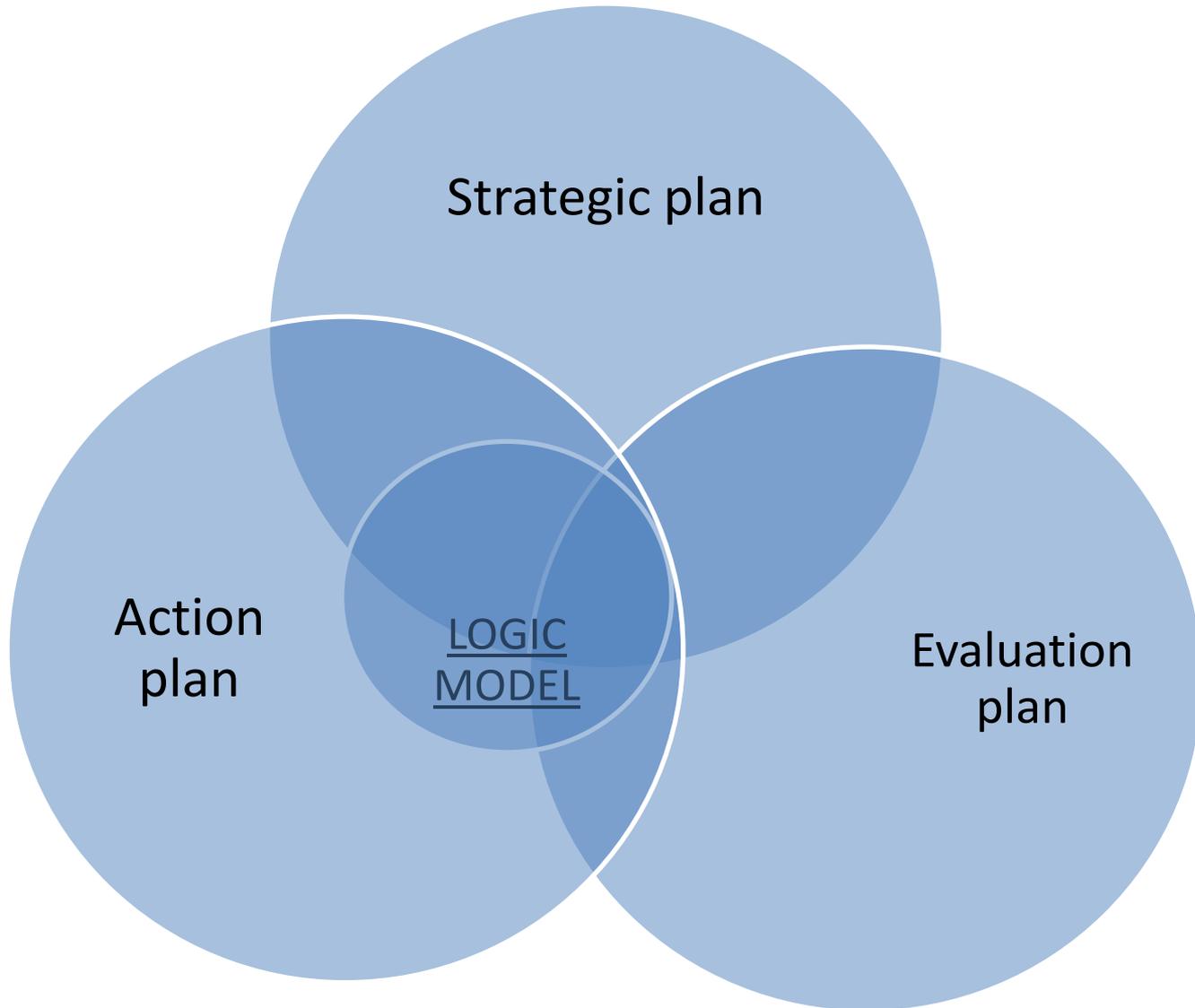
Focus groups

a group of people led in a guided discussion to provide feedback, opinions, beliefs, etc

Questionnaires and surveys

a set of questions to appraise, examine, or study a construct

Action (work) plans and logic models



What is a strategic plan?

- Contains the organization's overall strategy and direction
- It usually contains an organization's vision, mission, values, and strategy
- It's an overarching document that encompasses all the organizations work (on the other hand there may be multiple logic models and action plans in the one organization, reflecting different programs or work)

Why create strategic plan?

- It formalizes the direction an organization is taking over the next one or more years and spells out how it is going to get there
- Strategic plans ideally focus the time, energy, and resources of the organization in the same direction
- Strategic planning forces organizations to consider their current position and prioritize future directions

What is a Logic Model?

- A depiction of a program showing what the program will do and what it aims to accomplish
- A series of “if-then” relationships that, if implemented as intended, lead to the desired outcomes
- The core of program planning and evaluation

Why Create a Logic Model?

- A logic model is a Roadmap
- Quick view of:
 - Where program is headed
 - How it will get there
 - How to know once it is there



- Focus on and be accountable for what matters – OUTCOMES
- Makes assumptions EXPLICIT

“If you don’t know where you are going, how are you gonna’ know when you get there?”

Yogi Berra

What is an Action plan?

- It OPERATIONALIZES the logic model into achievable steps
- It's a step-by-step plan of achieve the desired goals and objectives

Why create an action plan?

- Action planning helps plan step-by-step how to achieve the objectives and how to monitor their progress
- It helps identify potential problems before they arrive
- It helps identify resources necessary to complete the work
- An action plan then becomes a reference document
 - It helps new staff continue with the work
 - It serves as a record of how you plan to move from problem to solution
 - It keeps teams accountable to the work
 - It is a measure of whether a project is on time and on track

Activity

- In pairs review the action plan examples
- What are their strengths and weaknesses? What would you change? What would you keep?
- How would the plans be helpful for evaluation?

Your SMART Objectives:

The ANCHOR of your Action Plan!

- Translate the longer-term outcomes from your strategic plan into SMART objectives
- Likely will take many, incremental objectives to arrive at the targeted outcome stated in a larger strategic plan
- REMEMBER!... Objectives are achievements
 - The “what”, not the “how”
 - The CHANGE you want to see!



Writing S.M.A.R.T. Objectives



- **Specific**: Identifies a specific CHANGE that will take place
- **Measurable**: Identifies the amount of change (quantitative) AND/OR Describes precisely the quality of the change (qualitative) to be achieved
- **Achievable**: Is achievable and realistic
- **Relevant**: Is logical (based on evidence and experience) and relates to the larger agency goals
- **Time-bound**: Includes a date by which the objective will be achieved

Activity

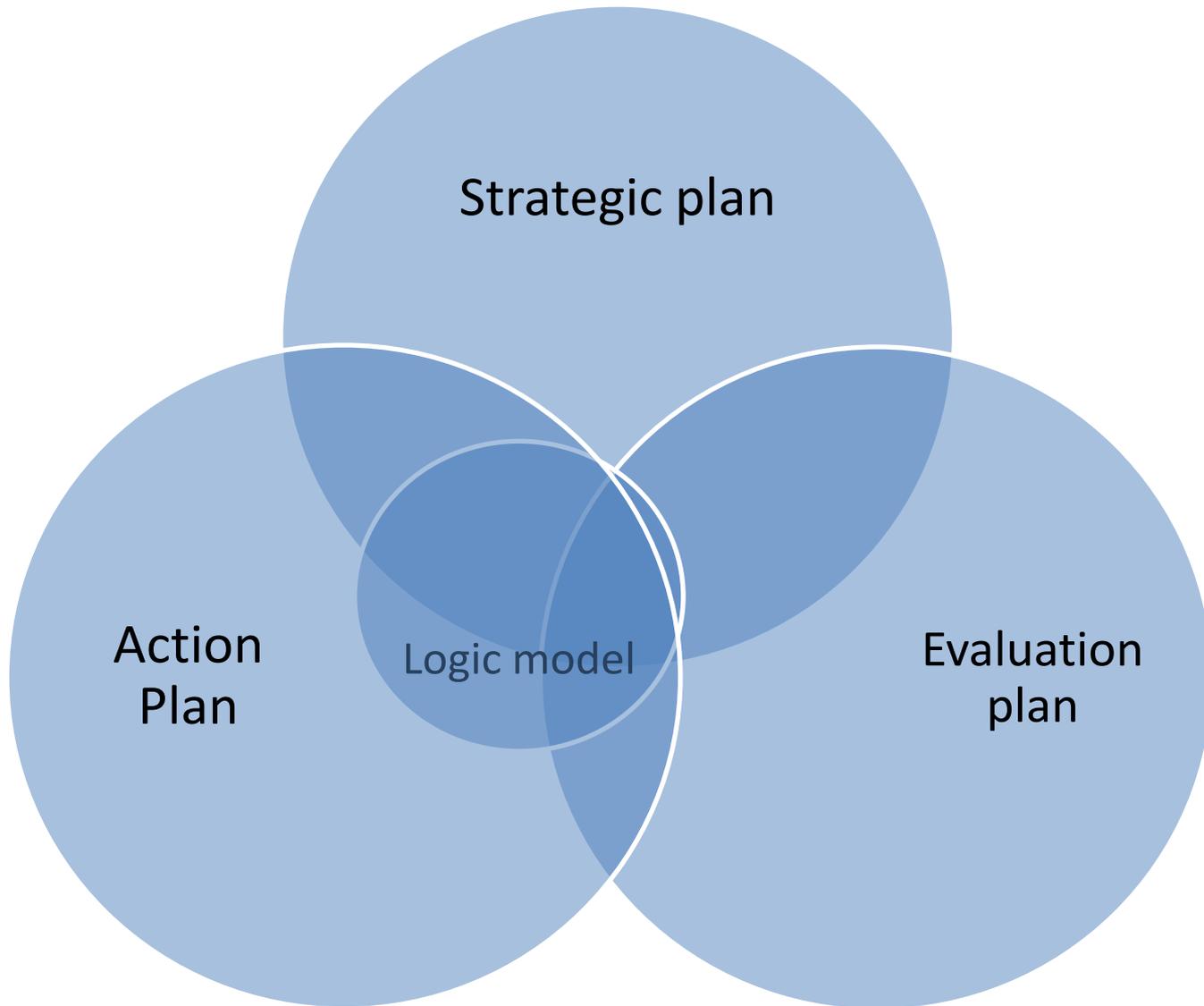
- In pairs, come up with some SMART objectives for this examples.
- Share your objectives with your table.
- How were the objectives the same or different?
- How would they be useful for evaluation?

What is an evaluation plan?

- A detailed description of how an evaluation will be implemented and what it will measure
- Includes details on resources, data sources, methods, and a timeline
- Ideally is written at the beginning of implementation

Why create an evaluation plan?

- Helps conceptualize complex and multifaceted evaluations
- Helps improve the quality of the evaluation by pre-planning and fully conceptualizing the goals and methods
- The finished product serves as a guide to implementation
- It saves time by honing the scope, goals, and methods to be more effective and efficient.



Strategic plan

Action
Plan

Logic model

Evaluation
plan

Evaluation planning

1. Engage stakeholders
2. Describe the program (e.g. logic model)
3. Focus the evaluation (consider scope and resources)
4. Gather credible evidence
5. Interpret data
6. Disseminate findings. Share lessons learned.

<http://www.cdc.gov/obesity/downloads/CDC-Evaluation-Workbook-508.pdf>

Using an evaluation plan template

- Executive summary
 - Summaries the rationale of the evaluation plan. Similar to the abstract of a journal article.
- Program background
 - Gives relevant background on the program being evaluated. Can be taken from action plan/logic model.
- Stakeholder information
 - Lists important stakeholders who will use the final evaluation. May include a communication plan.
- Evaluation background
 - Rationale behind the evaluation...decisions made, limitations. Contains a subsection on evaluation questions and deliverables.
- Proposed methodology
 - How will you collect data to answer the evaluation questions?
- Timeline and/or monitoring plan
 - Discuss how the evaluation will be implemented and monitored.

Wrap up activity

- In pairs, consider the example from the last activity.
- Jot down some possible evaluation questions and ideas for measuring and answering them.
- What are the steps you would take to evaluate this example?
- Share your ideas with the larger group.

Monitoring your Evaluation Plan Using Strategy Management Software

- SMS allows for:
 - communicate priorities, and strategies
 - timely, reliable, coordinated and transparent
 - fosters accountability
- Especially valuable when there are multiple agencies

PHC-CO: Increase Neighborhood Recreational Fitness Services



Description From - To Gap

Scorecards ▾ Maps ▾ Objectives ▾ Key Indicators ▾ Initiatives ▾ Action Items ▾



Increase Neig

In order to sup
increase the av
recreational life:

Fitness shoul
communities, a

Advocate: Mary J
Link to Wiki InfoShe

↑ Complete I-5 highway renovations (example project plan)

2010

Objectives

↑ Transportation, Mobility and Connectivity

Project Manager

Jeremy Sutherland (ClearPoint Support)

Description

The project has been chartered and funded to improve the frequent traffic problems our citizens encounter on Main Street, West 15th Street, and C Street. The congestion, delays, and related accidents are related to rush-hour demands from a number of citizens going to, and returning home from work. The project involves a number of modifications to the roadway as well as the traffic signals to improve flow, increase safety, and reduce time and fuel wasted by commuters.

Expected Duration: August 2010- Sep 2011
Approved Budget: \$1,200,000

Analysis

This project is on-schedule but slightly above budget to to increased fuel and material costs. Phase I Modifications are nearing completion and Phase II Modifications are expected to begin on June 1st.

The remainder of the work will be completed at night to minimize distrupstions. Street Signs will notify drivers of upcoming closures and/or delays.

**** Please drive carefully in work zones ****

Action Items

↑ Call the newspaper & report solid progress

Percent of Budget Spent

54%

Initiative Snapshot



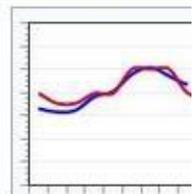
Milestones Gantt Chart

Name	2000			
	2009	2010	2011	2012
▼ Complete I-5 highway renovations ([Green bar spanning 2009, 2010, and 2011]			
Identify Maintenance Needs	[Green bar spanning 2009 and 2010]			
Design Required Highway Mods		[Green bar]		
Phase I Modifications			[Yellow bar]	
Phase II Modifications			[Yellow bar]	
Final Inspection				[Grey bar]

Attachments

Project Area Map (PDF)

Measures



Description
Number of Part
Programs.

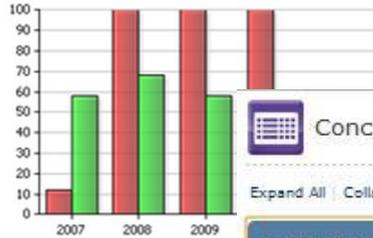
Dashboard

↑ Percent of operating revenues from airfield revenues

↑ Variance from approved revenue budget

■ T-hangar spaces available

↓ Outside tie downs available



Concern: Reduce Childhood Obesity (PHC-CO)

🔧 Edit Mode 🖨️ Print to PDF

Expand All | Collapse All

Theme Filter: No Theme Filter Applied

Scorecards: Concern: Reduce Childhood Obesity (PHC-CO)

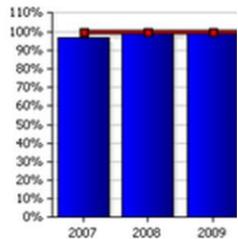
Community Health Status

Name	Prior Period	Current Value	Change	Target Value	Most Recent Period	Comments/Initiatives
PHC-CO: Minimize Childhood Obesity						
PHC-CO: % of Children in School who are Obese	22.0%	21.0%	↓ 1	14.0%	Year 2012	📄
PHC-CO: % of students participating in physical activities	75%	86%	↑ 3	85%	Year 2012	📄 📁
PHC-CO: Improve Child Nutrition and Reduce Calories Consumed						
PHC-CO: % of students achieving nutritional goals	73.0%	75.0%	↑ 3	80.0%	Year 2012	📄
PHC-CO: % of available food meeting nutritional goals	72%	75%	↑ 3	90%	Year 2012	📄 📁
PHC-CO: Increase Age Appropriate Activity						
PHC-CO: % of youth doing more than 1 hour exercise per day	45%	48%	↑ 3	65%	Year 2012	📄 📁
PHC-CO: Number of opportunities for physical activity	1	7	↑ 1	5	Year 2012	📄

Community Implementation

Name	Prior Period	Current Value	Change	Target Value	Most Recent Period	Comments/Initiatives
PHC-CO: Promote Family Nutrition & Fitness to Parents & Kids						
PHC-CO: % Parents signing Nutrition Compacts	65%	69%	↑ 5	75%	Year 2012	📄 📁
PHC-CO: Family fitness classes offered every month	12	14	↑ 5	12	Year 2012	📄
PHC-CO: Improve School Nutrition & Fitness Activities						
PHC-CO: % of Students Getting Presidential Fitness Award	13%	16%	↑ 2	15%	Year 2012	📄

■ Percent of t-hangar s



Dashboards

Use of strategy management systems in your community

- Scaling based on:
 - size,
 - number of partners,
 - complexity of plan,
 - demand of community
- Partner with other organizations to purchase

THANK YOU!

Evaluation tips

- Evaluations can be big or small, simple or complex.
- Your evaluation is only as strong as your data sources.
- Consider multiple data sources and mixed methods.
- Think outside of traditional data sources or methods.
- Be objective.
- Engage stakeholders- who will use your evaluation, what do they want to know?
- All evaluations have limitations. That's OK as long as you understand them and recognize them.