### Worksheet 1. Engaging Partners in the Evaluation. See [Toolkit Slides 14–17](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit) for more information.

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| **Which** organizations and partners need to be at the table? | **Who** should participate in evaluation design, implementation, and review? | Will they participate in your evaluation workgroup? | **How** will youkeep them informed and/or encourage participation, especially if they aren’t part of the workgroup? |
| Organization name | Name and/or role of specific person(s) | Yes or No | Example: Integrate as agenda item on existing board meetings; identify champion to ensure board involvement. |
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Adapted from: *Building Capacity in Evaluating Outcomes: A Teaching and Facilitating Resources for Community-based Programs and* Organizations, University of Wisconsin-Extension, 2008.

### Worksheet 2a. Create a Logic Model — Questionnaire. See [Toolkit Slides 22–2](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit)6 for more information.

To inform the creation of a logic model, please answer the following questions about a program or set of activities you are interested in evaluating. Your responses do not need to be inclusive of all of your organization or coalition’s programs or activities.

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| **Topic** | **Question** | **Notes** |
| Impact/Goal | What problem or issue are you trying to address? |  |
| Activities | What specific activities (convenings, press releases, training, services, advocacy, etc.) will you conduct to address the problem or issue? |  |
| Participation | For each activity you identified above, who are you trying to reach? |  |
| Inputs | What resources are needed to successfully complete each activity (time, talent, technology, information, money, community partnerships, etc.)? |  |
| Short-Term Outcomes | What changes do you expect to see fairly immediately as a result of your activities (include time frame)? |  |
| Intermediate Outcomes | What do you expect to follow from the short-term outcomes (include time frame — often by the end of the grant, or within 5 years)? |  |
| Long-Term Outcomes | Long term (include time frame), what will be different if you are successful? Goals may be fair past the end of the evaluation and not necessarily measurable. |  |

### Worksheet 2b. Create a Logic Model — Template. See [Toolkit Slides 22–2](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit)6 for more information.

**Outcomes**

**Intermediate**

What resources do we need?

R1:

R2:

etc.

What changes to we expect to see in [add time frame]?

I1:

I2:

etc.

What changes do we expect to see long-term [add time frame]?

L1:

L2:

etc.

**Participation**

Who are we trying to reach with our activities?

P1:

P2:

etc.

What are we going to do? (What activities or action items are planned?)

A1:

A2:

etc.

**Inputs**

**Activities**

**Outputs**

**Long-term**

**Short-term**

What changes do we expect to see short-term [add time frame]?

S1:

S2:

etc.

**Impact**

What is the ultimate goal for this program?

### Worksheet 3. Create and Prioritize Evaluation Questions. See [Toolkit Slides 18–21](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit) for more information.

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| **What do you and your partners need or want to know?**  **(Write as questions.)** | **Map to logic model.**  **(Refer to Worksheet 3b if creating in parallel, not sequentially.)** | **Who would be interested in this information?**  **(Refer to Worksheet 1.)** | **How will the information be used?** | **Prioritize questions**  **Scale: 3=High 2=Medium 1=Low** | |
| **Usefulness to support decisionmaking, etc.** | **Feasible to measure/ track at this stage of implementation** |
| **Example:** To what extent is the program improving health outcomes? | L2 | Investors  Implementing partners | Determine future investments | 3 | 3 |
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Adapted from: *Building Capacity in Evaluating Outcomes: A Teaching and Facilitating Resources for Community-based Programs and* Organizations, University of Wisconsin-Extension, 2008.

Worksheet 4a. Identify Measures, Data Sources, and Data Collection Methods. See [Toolkit Slides 28–30](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit) for more information.

Referring to Worksheet 2, complete the first column (evaluation questions) with the ones you’ve decided to include in the evaluation. Develop a list of measures and then determine where or from whom you will get the information (data source) and how you will collect the information (data collection method).

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| **Evaluation Questions**  **(from Worksheet 2)** | **Measure(s)** | **Data Source** | **Data Collection Method** | **Frequency and Timing** |
| **Example:**  To what extent is the program improving health outcomes? | a. Blood pressure control before and after participation  b. Participant perception of changes in health status | a. Electronic health record  b. Patients | a. Data export / doc review  b. Interviews | a. Quarterly data pulls  b. 3 mo. post-program interview |
| 1. | a.  b.  c. | a.  b.  c. | a.  b.  c. | a.  b.  c. |
| 2. | a.  b.  c. | a.  b.  c. | a.  b.  c. | a.  b.  c. |
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### Worksheet 4b. Identify Data Specifications. See [Toolkit Slides 31–38](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit) for more information.

For your quantitative data coming from existing systems, you will need to develop a data specifications table to articulate the specific data elements that you will need to pull for the evaluation.

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| **Domain** | **Category** | **Quantitative Variable** | **Data Source** | **Variable Name** | **Description of Variable** | **Frequency/Timing of Data Collection** | **Notes on Inclusion/ Exclusion** |
| **Example:**  Health and demographics | Birthing person | Gestational diabetes (GD) | Electronic health record | DMGest | Checkbox yes | One-time data pull at the end of the study period | Every pregnant person who gave birth between XX and YY date, with a dx of GD |
| **Example:**  Health and demographics | Baby | Birth weight | Electronic health record | Birthwt | Numeric — kg | One-time data pull at the end of the study period | Every baby born between XX and YY date |
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### Worksheet 5. Determine the Best Study Design. See [Toolkit Slides](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit) 43–49 for more information.

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| **Consideration** | **Approach** | **Description/Comments (Open Ended)** |
| **Sample Size** | [Insert total number of people in your sample, and how many you will be aiming to reach.] |  |
| **Segmentation Required (or Specific Subpopulations of Focus)** | [Specify subpopulations of focus and/or variables that you want to segment by.] |  |
| **Approach to Comparison Groups** | Check all that apply:   * Internal comparison — change over time * Internal comparison — dose/response * Internal comparison — staggered start date * External comparison (specify approach in comments) * Other, please explain in comments |  |
| **Timing of the Evaluation Relative to the Intervention** | Check all that apply:   * Beginning (before / at the beginning of the intervention) * During (throughout the pilot or phase of implementation) * After (after the intervention has ended, retrospectively) |  |
| **Data Availability** | * Prospective (ongoing) * Prospective (at set points in time) * Retrospective |  |
| **Equity Considerations (Informed by** [**Evaluation Discussion Guide**](https://www.cche.org/application/files/8916/8384/3610/Incorporating_EID_into_our_evaluation_plans_facilitation_guide_2_pager_2022.11.4.pdf)**)** | [Describe how you are addressing equity in your evaluation plan.] | |

Once you have determined what is feasible, use the tables from the [Toolkit Slides](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit) 43–49 to determine the most appropriate study design.

### Worksheet 6. Document Data Analysis and Interpretation Plan. See [Toolkit Slides](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit) 50–52 for more information.

After you have determined your study design, you need to document how you will organize and analyze data.

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| **Evaluation Question** | **Data Type** | **Analysis Proposed** | **Output Initial Ideas** |
| What services are patients utilizing?  Are there differences in utilization by engagement? Demographics? | EHR utilization data | Per member, over time period XX to YY:   * Rate of emergency department utilization and hospitalization * Rate of primary care utilization and specialty medical services utilization   Utilization trends by length of engagement in program (utilization before engagement, at three months, six months) and by patient characteristics | Excel tables  Graphs of utilization trends and Excel tables |
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### Worksheet 7. Develop Project Budget. See [Toolkit Slide 57](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit) for more information.

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| **Budget Item** | **Budget** | **Considerations** |
| **Direct Costs (Examples)** |  |  |
| Staff Time (Salaries and Benefits) | $ | * Budget for all staff that need to engage, including leaders, project managers, analysts. * Consider how your staff are paid (e.g., charge to specific accounts or projects, or paid from administrative funds). For administratively funded staff, you will still need commitment for their time from leaders. * Include time for project management, coordination, and meetings in addition to project-specific activities. * Might need to include time and other resources for your partners’ engagement, capacity building, technical assistance, etc., depending on their time, other resources, and expertise. |
| Consultant Time | $ | * Consider additional capacity you would need to hire externally. * Identify the scope and hours for any consultants. |
| Transcription | $ | * For primary qualitative data collection, transcriptionist services might be needed to help document notes from interview or focus group recordings |
| Incentives | $ | * Consider paying people for their time to participate in evaluation activities. This is particularly important for patients, health plan members, and community members. |
| Translation and Interpretation | $ | * Depending on the languages spoken in your target population, document translation or interpreter support may be needed. |
| Other Data Collection Expenses | $ | * You may need access to additional platforms, software, data, etc., to conduct your evaluation (e.g., survey platforms, data analysis tools, and virtual meeting platforms). |
| Travel Expenses | $ | * There may be expenses related to travel for evaluation meetings or data collection or both. * Mileage reimbursement, food allowances, etc., are also potentially needed |
| In-Person Meeting Expenses | $ | * If conducting meetings or data collection in person, consider costs associated with hosting in-person meetings (e.g., food, space, parking, childcare). |
| Communications and Dissemination | $ | * You may have additional expenses related to creating products, promoting evaluation results, publishing findings, etc. |
| **Indirect Costs** |  |  |
| Overhead Internal Costs | $ | * Often indirect costs are added onto budgets as a percentage of direct costs. Some funders cap the allowable indirect rate, so you will need to consult with them to determine this amount. |
| **TOTAL** | $ | Sum of all lines above |

Worksheet 8. Develop Evaluation Timeline. See [Toolkit Slide 5](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit)8 for more information.

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| **Month** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** |
| Coordination with Evaluation Workgroup |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Evaluation Planning** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Logic Model Development |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Evaluation Planning |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| IRB and Data Sharing Agreements |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Program Familiarization and Document Review |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Secondary Data Collection and Analysis** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Define Metrics and Data Specs |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Initial Data Pull, Including Merging Data |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Validate and Refine Data Pulls |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Midpoint Data Pull, Including Cleaning and Merging Data |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Midpoint Analysis |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Final Data Pull, Including Cleaning and Merging Data |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Final Analysis |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Primary Data Collection (e.g., Interviews) and Analysis** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Develop, Test, Refine Interview Protocols |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Recruit Potential Interviewees |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Conduct Interviews |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Qualitative Analysis (Coding, Theming) |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| *[Add additional rows as needed, for surveys, etc.]* |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| **Synthesis and Reporting** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Data Integration and Synthesis Across Methods |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Interim Report |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Final Report |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Presentations to Key Partners |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Manuscript Submissions |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

### Worksheet 9. Disseminate Results to Key Partners. See [Toolkit Slides 64-–66](https://cche.org/our-work/tools-and-resources/tech-innovations-evaluation-toolkit) for more information.

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| **Who?**  (See Worksheet 1.) | **What information do you need to share with them?** | **Why?** | **How will you share the information** (e.g., report, presentation, personal discussion, media release)? | **When should the information be shared?** |
| **Example:** Investors | Progress toward goals | To inform future investments | Written and oral report at regular meetings | Quarterly |
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