



ENSURING MEANINGFUL SYSTEMS OF MEASUREMENT:

Evaluation Planning Tool



INTRODUCTION

Is your local wellness fund on track to bring about intended results?

Evaluation is a critical component of any local wellness fund and integral to ensuring program effectiveness, measuring impact, and communicating results to partners, funders, and other key stakeholders. Through the development and implementation of an evaluation plan, those involved with local wellness funds are able to track and monitor progress over time and assess whether or not it is bringing about anticipated outcomes. A comprehensive evaluation plan should serve as an overarching guide and typically includes a purpose statement, logic model, evaluation questions, data collection approach, measures, analysis plan, and dissemination strategies. It is a living document and may be revised over time to reflect changes in your program strategy.

ASSESSING MEASUREMENT STRATEGIES

Ideally, evaluation planning is a process that takes place at the earliest stages of local wellness fund conceptualization. As local wellness funds move further into the evaluation implementation phase and begin gathering and analyzing data, those involved with the local wellness fund will begin to develop a deeper understanding of what is working and what is not, progress toward stated goals, and what kind of impact it is having on the community it serves. The evaluation strategy can be reassessed over time to ensure that it is still focused on asking the right questions and collecting the appropriate data.

The following three components of an evaluation should be examined periodically:

1 Evaluation Questions

2 Measures

3 Data Collection Methods and Tools

EVALUATION QUESTIONS

Evaluation questions serve as a good starting point as they essentially serve as the foundation for the evaluation plan. These are the primary questions of interest that the evaluation seeks to answer, including ones that focus on both implementation (i.e., process questions) and the impact of the program in the community (i.e., outcome questions). These are not to be confused with the questions a survey or other measurement tool might use for assessing a particular indicator. They represent the broader questions that help you understand the extent to which activities were implemented as planned and if your program had an effect, positive or negative, on its participants.

QUESTIONS TO CONSIDER:

- Are these evaluation questions the correct questions we need to ask?
- How well do they connect to our current approach?
- Are they still relevant and a priority for stakeholders?

MEASURES

Measures (or indicators) represent the units of measurement used to assess progress or results of a local wellness fund. They represent the data used to respond to your evaluation questions and ultimately to help tell the story of your local wellness fund.

QUESTIONS TO CONSIDER:

- Do these measures align with our evaluation questions and data collection strategies?
- Are they providing us with helpful information that can be used to inform the local wellness fund or demonstrate value?

DATA COLLECTION METHODS AND TOOLS

Based on the evaluation questions and selected measures, a data collection strategy will consider the primary sources for that information and how it will be obtained, including any tools or other resources (e.g., database, survey, key informant interview guide) required for gathering the data. Data collection strategies might focus on obtaining new data (e.g., primary data) or by drawing from existing data sources (e.g., secondary data).

QUESTIONS TO RECONSIDER:

- Are the current data collection methods and tools still working for us?
- Have any new potential data sources emerged that we should consider for our evaluation?
- Are we implementing a data collection approach that minimizes burden on staff, partners, and stakeholders?

HOW TO USE THIS TOOL

This resource may be used individually but is ideally utilized with others involved in the evaluation (e.g., staff, partners). It is intended to be used in conjunction with a review of your program evaluation plan, specifically focusing on your evaluation questions, measures (indicators), and data collection methods and tools. The tools take you through each of these three components of the evaluation plan, providing an assessment checkbox, questions for individual reflection or discussion with others, and a place to note implications for action.

Identify partners and staff to complete the tool. Together, review the components of the tool and select the answer that best describes your program's evaluation for each question posed. Capture your group's responses and record implications for action. The goal is to use the tool and its results to facilitate dialogue among the team and use the results of that discussion to determine action items you can implement to modify your measurement strategies.

MEASUREMENT ASSESSMENT TOOL

| CRITERION | REVIEW QUESTIONS | RESPONSE | COMMENTS |
|--|--|---|----------|
| Evaluation Questions | <ol style="list-style-type: none"> Do the evaluation questions clearly articulate the main outcomes of interest to be assessed? Do the evaluation questions address primary evaluation components: implementation (process), outputs, short- and long-term outcomes, and impact measures? Are priorities and interests of other stakeholders addressed (e.g., staff, partners, community members, funders, policy makers)? Is the focus comprehensive enough to detect successes and challenges of the program? | <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> | |
| Evaluation Measures (Indicators) | <ol style="list-style-type: none"> Are the indicators specific, observable, and measurable? Are the measures focused on local wellness fund processes, as well as prioritized community needs? Are there accurate and reliable data available to assess each measure? Can the data be compared over time? Are the measures compatible with other performance measures important to the local wellness fund and those of partners? | <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> | |
| Data Collection Methods (and Tools) | <ol style="list-style-type: none"> Are the current data collection methods and tools effective (or relevant) for collecting the data needed? Are various sources of evidence/methods of data collection included in our evaluation plan (e.g., surveys, interviews, observation, population data extracted from public datasets or partners' private datasets)? Does the plan clearly outline when data will be collected, how it will be analyzed, and by whom? Is the approach (or plan) for data collection realistic and reasonable given time, resources, and staff capacity? | <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> To some extent <input type="checkbox"/></p> | |