Project Evaluation Plan Guide

Rural Health Network Development Program Technical Assistance

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Rural Health Innovations
NATIONAL RURAL HEALTH RESOURCE CENTER

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BACKGROUND AND PURPOSE

Rural Health Innovations (RHI), LLC, is a subsidiary of the National Rural Health Resource Center (The Center), a non-profit organization. Together, RHI and The Center are a leading technical assistance and knowledge center in rural health. In partnership with The Center, RHI enhances the health of rural communities by providing products and services with a focus on excellence and innovation. RHI is providing technical assistance (TA) to the Rural Health Network Development grantees through a contract with the Federal Office of Rural Health Policy (FORHP).

Evaluation of grant funded programs is critical to both the success and sustainability of the project. It is essential to assess impact of the project objectives to demonstrate value, monitor progress toward the project goals, and to identify potential best practices and lessons learned. Evaluation results are also used to improve project performance.

This *Project Evaluation Plan Guide* is designed to support the associated *Evaluation Plan Template* and provide guidance to Network Development grantees to create a project evaluation plan. This Guide is designed as part of a toolkit that also includes a template and sample documents. This toolkit is supported with an educational webinar: *Project Evaluation Planning Toolkit.* The webinar will be recorded and posted on the Network Development Program webpage, the Aim for Sustainability network resource webpage and as a resource in The Center's Resource Library.

Content for this Project Evaluation Plan Guide and the accompanying *Evaluation Plan Template* is based on the Rural Health Innovations, Evaluation Plan Toolkit for Rural Health Networks, January 2015. See the Resources section in this guide for links to other support materials.

GLOSSARY

Balanced Scorecard: A measurement-based strategic management system, originated by Robert Kaplan and David Norton, which provides a method of aligning business activities to the strategy, and monitoring performance of strategic goals over time.

Benchmark: The process of comparing one set of measurements of a process, product or service to those of another organization. The objective of benchmarking is to set appropriate reliability and quality metrics for your organization based on metrics for similar processes in other organizations.

Effectiveness: (a) Degree to which an activity or initiative is successful in achieving a specified goal.

Evaluation: Any effort to use assessment evidence or performance measurements to improve organizational or project effectiveness.

Goals: Future conditions or performance levels an organization or project intends or desires to attain.

Initiatives: those six to eighteen-month activities that when executed, will move the network toward the objective.

Input: Resources (funds, labor, time, equipment, space, technology etc.) used to produce outputs and outcomes.

Key: Major or most important; critical to achieving intended outcome(s).

Logic Model: A generic model of any business process, which breaks it down into inputs, activities (or processes), outputs, and outcomes (or results).

Measure – the description of the measurement (i.e., the number participated, A1C level, number of education sessions)

Measurement: The data resulting from the measurement effort. Measurement also implies a methodology, analysis, and other activities involved with how particular measurements are collected and managed.

Mission: Organization’s overall function.

Objective: An aim or intended result of a strategy.

Outcome: A description of the intended result, effect, or consequence that will occur from carrying out a program or activity. The result that is sought.

Output: The immediate products of internal activity: the amount of work done within the organization.

Plan: A prescribed, written sequence of actions to achieve a goal, usually ordered in phases or steps with a schedule and measurable targets; defines who is responsible for achievement, who will do the work, and links to other related plans and goals. For example: strategic plan, evaluation plan, marketing plan, work plan, and business plan.

Stakeholder: An individual or group with an interest in the success of an organization in delivering intended results and maintaining the viability of the organization's products and services. Stakeholders influence programs, products, and services.

Strategic Objectives: The aims or responses that an organization or project articulates to address major changes or improvement, competitiveness or social issues and service advantages.

Target: A metric that is used to identify the degree of level of the measure; the target defines the result. For example, the target for the measure of A1C is a specific decreased percentage.

Vision: Organization's desired future state.

Glossary definitions derived from the Balanced Scorecard Institute, http://www.balancedscorecard.org/BSC-Basics/About-the-Balanced-Scorecard/Definitions) and The Baldridge Framework, http://www.baldrige21.com/Baldrige_Glossary.html.

GETTING STARTED WITH EVALUATION PLANNING

The overall purpose and intention of engaging in evaluation efforts is to demonstrate, incrementally, positive change (results) toward the organization's vision and project goals.

Network Vision and Project Goals

Entering the evaluation planning process, the vision and project goals of a network are already formed. A network's vision is a description of the desired future state. The network's vision describes how the world will be a different because of its work. The vision acts as a "beacon" through any planning process. The network's project goals describe the aim of the project. To be effective, the project goals are tied to, or are aligned with, the network's mission and vision. Generally, project goals are articulated within the grant application and will remain constant during the life of the project.

It is recommended that the first step a network takes in their evaluation planning process is to review and gain a shared understanding and commitment of the network's vision and project goals from their members, partners and stakeholders. *(Contact RHI for a Guide to Establish a Network Vison, if needed.)*

> Network Organization Vision Example: *Working collaboratively and bringing value to our members to improve the health and well-being of our community.*
>
> Project Goal Example: *Improving access to health care for children living in poverty.*

Strategic Planning Cycle

The dynamic and iterative environment of planning, communicating, operationalizing and adapting describes a strategic planning cycle.

Robert Kaplan and David Norton, business management writers and researchers of the 1980's, studied organizations to gain understanding of why some businesses succeeded, while others did not. They discovered that successful organizations approached planning in a holistic way. This planning approach and methodology is called Balanced Scorecard (BSC). One of the key aspects of the Balanced Scorecard methodology is the Strategic Planning Cycle.

The Strategic Planning Cycle includes a phase, we will refer to as the Analyze and Plan phase, where strategic objectives are developed using information from the environment. The intention of the analysis is to identify and leverage what is going well and address those aspects of the environment that are blocking progress toward the network's shared vision.

The Strategic Plan includes three of the four elements in Analyze and Plan phase of the Cycle: 1) Commitment to the network's mission and vision, 2) Environmental scan and analysis, and 3) Identifying strategic objectives that guide the network toward its vision. The fourth element of Analyzing and Planning phase is to determine what will be measured to show progress toward project goals and initiatives. This creates the Evaluation Plan.

There may be several types of measures in an Evaluation Plan. Measures for strategies or outcomes answer the question, "What does success look like?" for each of the strategic objectives. For example, success for improving the health of patients with diabetes may be measured by a percentage improvement in A1C levels. Or success for increasing access to primary care may be measured by a reduction in ED use and positive patient satisfaction scores for new patients in the primary care clinic setting.

Measures for initiatives or process outputs tally events and activities, for example,

- Number of new patients receiving services each month
- Number of trainings, events and services
- Number of community members participating in events or activities

Like measures, there are several different planning frameworks or approaches for planning. Each approach has its strengths and best applications; therefore, individuals and networks may have a preferred approach. The framework selected is typically based on the preference of network leadership, however, we find that the Balanced Scorecard (BSC) Framework is a good fit for the network environment. This Guide includes language based on the BSC Framework.

Strategic Planning Cycle

Analyze and Plan

- Commitment to the Network's mission and vision (*Strategic Plan*)
- Environmental scan and analysis to identify levers and blocks (*Strategic Plan*)
- Strategic objectives; achievements that move toward the vision (*Strategic Plan*)
- Evaluation measures and targets that support future monitoring and adapting (Evaluation Plan)

Document and Communicate

- Communication plan for the entire life of the strategic planning cycle (*Strategic,* Evaluation *and Marketing Plans)*

Execute

- Operationalizing the strategic objectives with key initiatives *(Work Plan)*

Monitor and Adapt

- Monitoring progress toward expected measures and adjusting plans to improve implementation or outcomes *(Evaluation Plan)*

The descriptive language and terms may vary between frameworks or approaches. Therefore, whichever planning framework is selected, it is important be consistent with that language throughout the planning and documentation process. No matter what methodology is used, refer to the definitions put forth in this guide to determine the terminology that best applies. Here are suggestions for translating between Logic Model terminology to BSC terminology; "impact" translates to "project goals", "outcomes" translate to "strategic objectives" and "outputs and initiatives" translate to “workplan initiatives”. In summary, it does not matter what terminology is used if there is consistency throughout the work.

Continuing around the Strategic Planning Cycle, the next phase is Documenting and Communicating. This includes communicating the mission, values, vision, strategic objectives and measures to network members, partners and stakeholders. The goal of the Communication and Documentation phase is to engage all involved so that everyone understands: 1) what the network is aiming to achieve, 2) the agreed upon paths for getting there and 3) the measures for success.

A critical phase for success is to operationalize the strategic objectives by creating and executing key initiatives or executing the project’s workplan. Lastly, to address an ever-shifting environment, network leadership must both monitor progress toward the strategic objectives and key initiatives to adjust to any challenges while advancing toward the vision and project goals.

Project Strategic Objectives

The strategic planning process was all about developing strategic objectives, which describes the high-level path that will lead to the accomplishment of project goals. These strategic objectives are measured to monitor progress toward project goals. These objectives are found in the “Strategic Objectives” section of the Strategic Plan, between the Environmental Scan and Communication Plan.

The key to successfully evaluating strategic objectives is to have SMART Objectives (**S**pecific, **M**easurable, **A**ttainable, **R**ealistic and **T**imely). It is well worth the time and effort to review current network strategic objectives to ensure they are SMART Objectives. See examples below.

- Broad Strategic Objectives:
    - Everyone is healthy.
    - Creating a care coordination process.
- SMART Objectives:
    - The overall health of diabetes patients in our community will improve within three years.
    - A care coordination process will be developed and implemented in three clinics and two CAHs by end of year-two.

In the strategic planning process, a facilitated conversation is held leading participants to an agreed-upon definition of “what success looks like” for each strategic objective. When those definitions have been determined, they are added to the network’s “broad objectives”, which will turn them into SMART objectives. Strategic Objectives are measured by outcome measures. Refer to the Strategic Planning Cycle (pgs. 5-7).

Project Workplan

Generally, the Project Workplan is found within the grant application. While many aspects will remain consistent during the life of the program or project, there are some elements that will need to be adjusted as the project progresses. This is due in part to the changing environment that the work is being carried out, but also because of the Monitoring and Adjusting phase of the Strategic Planning Cycle. As the workplan is implemented, initiatives will be monitored with process measures, again referring to the questions: "what does success look like?" or "what is the target measure for the initiative?" Refer to Strategic Planning Cycle (pgs. 5-7).

Project Evaluation Plan

A Project Evaluation Plan is an internal document used by a network implementing a project to articulate what success looks like. The purpose of the evaluation is to systematically collect information regarding strategic objectives and initiatives while monitoring progress and reporting and communicating results to network members, partners and stakeholders. Taking the initial time to study the components of the project's evaluation is well worth the effort and essentially will save a considerable amount of time in the process.

Time and energy, from much of the network's individuals, went into developing the project's goals, grant application process and development of partnerships to create the network's vision. As implementation begins, it is important to keep the vision at the forefront; a systematic evaluation will show if adjustments need to be made to the initial plan. The Evaluation Plan will help the network adjust to the continuously changing environment the project is being carried out in.

Process for Data Collection, Reporting, and Communication of Results

To systematically collect information regarding project initiatives and strategic objectives so that results are reported and communicate, processes for each must be developed. These processes are determined internally by network leadership and staff and are documented within the Evaluation Plan. Four common data gathering collection, reporting and communication processes include:

1. Tracking Spreadsheet– A tool to physically track the data gathered for the identified measures related to both the strategic objectives from the strategic plan and the key initiatives from the workplan. The data collected in the tracking spreadsheet is used to inform the Evaluation Results Scorecard.
2. Evaluation Results Scorecard - A table, or spreadsheet, that includes the result of measures identified within the Plan to Measure Key Data section of the Evaluation Plan. The actual data is gathered from the tracking spreadsheet.
3. Dashboard for Key Measures - A tool for communicating the status and progress of key project measures. The data for the dashboard will come from the Evaluation Results Scorecard.
4. Communication Plan – A plan to intentionally and purposefully, share progress and impact with project members, partners and stakeholders.

When developing these processes there are some common, underlying questions.

- Who will be responsible for design of the tool?
- What measures will be included?
- Who will be responsible for input?
- How will the information be shared; to whom and what frequency?

Answering these questions for the above tools will insure sound process development that will contribute to successful use of the Evaluation Plan.

EVALUATION PLAN COMPONENTS

Project Snapshot: Foundational elements the Evaluation Plan will be built on including vision, project goals, strategic objectives and initiatives.

Plan to Measure Key Data: Identifying both the data needed to monitor the progress of project impact and the tracking or monitoring initiatives that have been implemented and align with the network's strategic objectives.

Collecting and Monitoring Results: Collect data on initiatives from the workplan and on measures of the different strategic objectives. Track this data in a formal manner, such as a spreadsheet.

Evaluation Results Scorecard: The evaluation results scorecard is a table that includes the results of measures identified within the Plan to Measure section of the evaluation plan, including what, when and results.

Dashboard for Key Measures: Dashboards illustrate the status and progress of project strategic objectives. This is done by tracking or monitoring four to five key measures that demonstrate impact and success. Visual displays, such as diagrams or charts, provide a simple communication of achievement or progress toward critical project impact.

Project Snapshot

Foundational elements that the Evaluation Plan will be built from are shown in this Project Snapshot component and sets the context for planning efforts. It provides a high-level overview of the network's project by documenting the vision, project goals, strategic objectives and identified initiatives for each.

The *Project Evaluation Plan Template* includes a table to document these elements. An alternative is to provide a narrative of the elements.

- **Network Vision**: Shared vision identified in the strategic planning process.
- **Project Goals**: Goals found in the grant application and used in the Strategic Plan.
- **Project Strategic Objectives:** Strategic objectives identified in the planning process. They will be found in the "Strategic Objectives" or "Strategy Map" of the Strategic Plan.
- **Project Initiatives:** Most commonly found in a workplan. Some initiatives may have surfaced when identifying strategic objectives.

Plan to Measure Key Data

The Plan to Measure Key Data identifies the data needed to both monitor project impact and track implementation progress of the initiatives. Monitoring progress is key for showing progress toward the network's strategic objectives. Following is a suggested list of details to consider:

Project Strategic Objectives: For each project goal identify the associated strategic objectives.

What: Measurements that provide evidence of achievement, or success, for specific strategic objectives or initiative implementation; limit measurements to no more than three per strategic objective. Remember, evaluation is more than just numbers; persons, stories and best practices are also part of evaluation.

- Describe the measure (Quantitative and/or Qualitative)
- Provide a specific target or benchmark comparison
- Define how the measure will be calculated
- Identify the method of data collection

* *For more information on measurement, please see* Appendix A.

When: Identify timing, or frequency, of data collection (i.e. baseline, quarterly, annually, funding cycle etc.)

Who: Identify individual responsible for data collection. This person ensures accuracy and confidentiality.

Key Initiatives: Identify one or two key initiatives. Initiatives are workplan activities that have a six to eighteen-month timeframe for completion.

Using a numbering system throughout the Evaluation Plan will allow for easy-reading to quickly follow between sections, specific strategic objectives, outcomes and measures, targets, key initiatives, etc.

Collecting and Monitoring Results

Tracking spreadsheets act as a tool for the data gathering process to track and monitor identified measures related to both the strategic objectives from the strategic plan and the key initiatives from the workplan. The measures included within the tracking spreadsheet have been identified within the Evaluation Plan. The data in the tracking spreadsheet will be used to inform the Evaluation Results Scorecard.

When designing a data gathering and tracking process, consider the ability to capture both quantitative and qualitative data.

- *Qualitative data* provides insights on lessons learned while identifying best practices.
- *Quantitative data* provides numbers, rankings and ratings to help ensure efforts are on target.

Following is a suggested list of details about the data to incorporate into a tracking spreadsheet:

- **What:** This is a description of the data that is being collected including both a description of the measure and the expected target or benchmark of the measure.
- **Where:** Location of data
- **How:** Method for obtaining or gathering data (quantitative and qualitative)
- **When:** Timing or frequency of collecting and communicating data (baseline, quarterly, annually, funding cycle)
- **Who:** Individual responsible for gathering and analyzing data. This individual also ensures accuracy and confidentiality.
- **Results:** the actual data collected

This tracking spreadsheet will not be a part of the formal Evaluation Plan deliverable submission. However, it is necessary to gather the data for the Evaluation Results Scorecard. Keep in mind that it is very important not to neglect this tool.

Evaluation Results Scorecard

The Evaluation Results Scorecard is a tool, in a table or spreadsheet format, to report evaluation data from the Plan to Measure Key Data section of the Evaluation Plan. The specific data used to complete the Evaluation Results Scorecard comes from the data collection process or tracking spreadsheet described above. Components of the Scorecard include:

- **What:** Describe the measure and specific target or benchmark for comparison
- **When:** Identify timing or frequency of data collection (baseline, quarterly, annually, funding cycle)
- **Results:** What are the collected results or actual data to report

See *Project Evaluation Plan Samples* for illustrating program results and status. A table has also been provided in the *Project Strategic Plan Template*.

- Scorecards are tables or spreadsheets that provide an easy-to-read display of evaluation results with targets and benchmarks for comparison.
- It is effective to show result status using color (blue, green, yellow and red) to indicate success from ‘exceeds targets’ to ‘not meeting targets’.
- Network stakeholders can quickly identify those strategic objectives that require adjustments in actions or measurement.
- The information in the scorecard will be used to create reports, but most importantly used to create the dashboard.

It is important to assign one person to be responsible for building and maintaining the Scorecard for Monitoring Results. This task requires routine commitment to updating the tables to keep them timely and relevant.

Dashboard for Key Measures

The Dashboard for Key Measures is a key tool for the Study and Act phase of the Plan-Do-Study-Act (PDSA) Cycle. Dashboards are a tool for communicating the status and progress of key project measures. The format of the Dashboard is designed for the reader to quickly and easily understand the status and implications of a key measure. It is this Dashboard that network stakeholders will use to monitor progress of the Network Development grant project. The goal as a communication tool is to encourage discussion and problem solving related to the project and its impact on the network organization's mission, vision and project goals.

Key Measures

Key measures included in the Dashboard are the four to five project results that will show impact of the project and are considered critical for demonstrating success and are the measures included in the Dashboard. As the project progresses, these Key Measures will be reviewed by RHI, the assigned technical assistance provider, and the network Project Officer. Key measures are reviewed for progress to help to identify any needed adjustment(s).

To select the four to five key measures to include in the Dashboard, start with the Project Evaluation Results Scorecard. It is recommended to use the provided focused conversation, Appendix B, to include network stakeholders, board members and/or staff, to determine these measures together, collaboratively. This facilitated conversation creates a collaborative opportunity for deeper understanding of the project's key measures and desired outcomes.

Dashboard Design

Use the selected four to five key measures that are critical for demonstrating success of the project. Design the dashboard to be easy for network stakeholders to quickly identify those objectives that require adjustments in either actions or measurement. Data illustrated within the dashboard mimics the scorecard but because only the four to five key measures are included the document is easier to analyze and interpret. A suggestion is to color-code (blue, green, yellow and red) results to indicate measurement status from 'exceeds targets' to 'not meeting targets'. See the *Evaluation Plan Samples* for examples of dashboards. A dashboard template is also available in the *Project Evaluation Plan Template.*

Communication Plan

The purpose of a Communication Plan is to intentionally and purposefully share progress and impact with network members, partners and stakeholders as well as community members and funders when needed. The intention of a communication plan is to be intentional about telling a story about the organization; the impact it is having in helping to change the world. Thinking through intentional communication assists network leadership in focusing the message and methods and means for delivering the information.

Communication plans are important because they are a critical factor of network development. Intentional and effective communication builds trust and credibility between the network and its members and partners while increasing the likelihood of program sustainability.

Communication Plan Components:

- The initial step is to identify specific stakeholders, the audience, i.e. network staff, board members, member organization staff, potential partners, funders, community members, etc.
- Intentionally choose specific evaluation results to demonstrate project success based on the audience, i.e. stories that speak to accomplishments and impact. Use the Dashboard for Key Measures to identify results to include in the communication plan. It is possible that different results will be important to different audiences or stakeholder groups.
- Identify specific mode(s) of delivering the information based on the audience, i.e. in-person network board meetings, email, website, SharePoint, phone, formal reports, discussions, planning retreats, social media, etc.
- Identify frequency for providing the information based on the audience, i.e. ad hoc, monthly, quarterly, as requested, etc.
- Identify the person(s) and their roles and responsibilities for communication accuracy, timeliness, frequency, etc.

Keep this section to one page and consider using a visual display (table and/or chart) to describe the Communication Plan. A visual display template is included in the *Project Evaluation Plan Template*.

EVALUATION PLANNING RESOURCES

- Flex Program Evaluation Toolkit (Technical Assistance and Services Center) https://www.ruralcenter.org/sites/default/files/Flex%20Program%20Evaluation%20Toolkit_0.pdf
- Evaluating the Initiative (Community Toolbox, University of Kansas) https://ctb.ku.edu/en/evaluating-initiative
- Developing an Evaluation Plan (Community Toolbox, University of Kansas) https://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/evaluation-plan/main
- Designing Evaluations (General Accounting Office) https://www.gao.gov/special.pubs/10_1_4.pdf
- The Program Manager's Guide to Evaluation (Administration for Children and Families) https://www.acf.hhs.gov/sites/default/files/opre/program_managers_guide_to_eval2010.pdf
- Rural Assistance Center Online Library: Program Evaluation ***https://www.ruralhealthinfo.org/topics/rural-health-research-assessment-evaluation#program-evaluation (copy and paste this link into browser)***
- Source: CDC Evaluation Guide: Developing and Using a Logic Model https://www.cdc.gov/dhdsp/programs/spha/evaluation_guides/logic_model.htm
- Basic Guide to Program Evaluation (Including Outcomes Evaluation) https://managementhelp.org/evaluation/program-evaluation-guide.htm

APPENDIX A: EVALUATION MEASUREMENT

Asking Evaluation Questions

There are two critical evaluation questions in any Evaluation Plan: *"What progress has been made toward network objectives?"*, and *"What progress has been made toward network initiatives?"* Following are some examples of questions that may assist in identifying key metrics:

- What are opportunities to improve organizational processes for the upcoming year?
- What are opportunities to improve results?
- What has been learned?
- What are our best practices?

Quantitative Data

Quantitative data is data that is readily counted, for example, claims data, surveys, clinical results data and public health data. There are many ways to collect quantitative data. The key is to have a clear understanding of what the numbers are describing and how they are obtained. This understanding assists in accurately describing results and impact.

Following is a list of examples of data for measuring initiatives:

- Number of people served or participating
- Number of partners or stakeholders involved
- Implementation steps completed
- Number of resources addressing specific issues available
- Number of people with access to care
- Policy or regulation changes
- Attendance or certification and graduation rates

Following is a list of data-gathering options related to measuring strategic objectives:

- Pre-test/Post-test results (i.e. knowledge or awareness of issues)
- Surveys/Questionnaires/Checklists for norms, attitudes, satisfaction
- Electronic Health Record clinical results, such as lab results
- Mortality and morbidity numbers
- Quality of life scores
- Participation or graduation rates

Qualitative Data

Qualitative data is valuable to network leaders and stakeholders. It provides opportunity, through summarizing findings, to highlight areas for improvement, lessons learned, potential innovation, best practices and good ideas.

There are many ways to gather qualitative data as well as pros and cons for each. The key is to ask questions that capture stakeholders' perceptions of successes and challenges that were experienced during various phases of the project. Following is a list of data gathering options:

- Focus group
- Interview
- Observation

Analyzing qualitative data requires a systematic approach of grouping, or sorting the information, and identifying themes or common categories including:

- Code data
- Group or categorize to identify themes

Measuring Complex Data

Many programs are working to impact large health disparities and complex social-economic issues, along with their goals and objectives may be long-term. These long-term changes and measurement of complex information may need advanced data analysis. For example, consider external evaluations when seeking an unbiased study of the longer-term impact of project initiatives and when broader regional, state or national benchmarks are available.

Ensure data is collected consistently at each interval to allow for appropriate data analysis.

- Identify adequate resources for data analysis.
- Report significant changes based on statistical tests.
- Identify changes within groups or populations.
- Use visuals to display analyses. (e.g., bar or pie charts, graphs, etc.)

APPENDIX B: IDENTIFYING KEY MEASURES FACILITATION

<table>
<tr><td colspan="2">Rational Aim: To identify and select four to five key measures to include in the Dashboard for Key Measures which demonstrate progress toward the goals of the project. Gain consensus on those key measures.</td><td colspan="2">Experiential Aim: Participants will be in an open environment where they feel comfortable sharing ideas and heard and are in comfortable with the conclusions.</td></tr>
<tr><td colspan="4">Timing and Audience: 40-minute focused conversation. Audience includes five to six staff, board members and stakeholders. Can incorporate up to 30 participants in a round table format.</td></tr>
<tr><td colspan="4">Setup and materials: Hand out a copy of the Evaluation Results Scorecard for each person, flip charts and markers for recording.</td></tr>
<tr><td colspan="4">Focus Question: What are the Key Measures for our project that will demonstrate success toward the project goals?</td></tr>
<tr><td colspan="4">Opening: (2 min) It is important to identify and select the most important measures for our project that will demonstrate progress toward our project goals. We are collecting data to be able to communicate to our stakeholders that we are making progress. The key measures we select will help us tell the story of our project, showing that we are making a difference in the health of our community. We will incorporate the key measures into a Dashboard and then use within our communication plan. We will use the Evaluation Results Scorecard to consider all the measures that we are collecting and select the four or five most important measures to include in our Dashboard.</td></tr>
<tr><th>Objective</th><th>Reflective</th><th>Interpretive</th><th>Decisional</th></tr>
<tr><td>• Handout the Evaluation Results Scorecard
• Read through Project Goals that are included within the Scorecard document (be sure the project goals are numbered)
• Say: Looking through all the project measures on the Evaluation Results Scorecard, which measure stands out to you? Round Robin – Go around the group and have each person share their thoughts on at least one measure.</td><td>• Say: Of all the measures included in our Scorecard, which ones will we be able to collect complete data? Record these ideas on a flip chart or highlight them on the Evaluation Results Scorecard.
• Say: Let's identify which project goals these Scorecard measures speak to or help to illustrate success of that goal? Add project goal number to front of each measure included on flip chart.</td><td>• Say: Of these identified measures, which ones do you think are key to demonstrating the success of our project, i.e. help us tell the story? Place a colored check in front of those identified.
• Which of these are key to demonstrating impact of our project most effectively to our stakeholders? Place a different colored check in front of those identified.</td><td>• Say: We are going to select the top measures to include in our Dashboard by each of you placing a mark by the three measures you feel are key in the communication of success of the project.
• Tally the marks and circle the total number to identify the top five measures
• Gain consensus agreement on top five measures using Thumbs-up method: thumbs up (agree) or flat (I can live with that), or thumbs down (I can't live with that). Do not complete planning without full consensus (thumbs up or flat). If there are any thumbs down, then more discussion is needed.</td></tr>
<tr><td>10 min</td><td>10 min</td><td>10 min</td><td>10 min</td></tr>
<tr><td colspan="4">Closing: (1 min) Read the measures determined. We will move forward with these in our evaluation planning efforts.</td></tr>
</table>