

What Is Evaluation?

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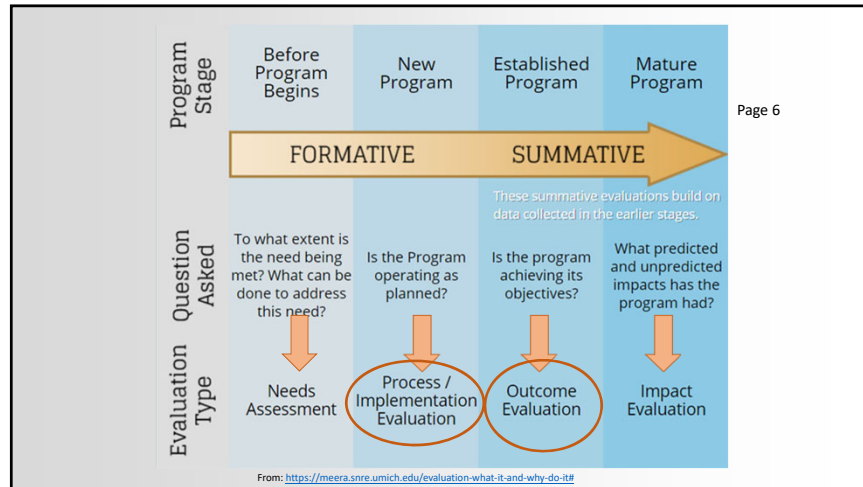
Evaluation is the systematic assessment of the design, implementation or results of an initiative for the purposes of learning or decision-making. (Canadian Evaluation Society, 2015).

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Key Components of Defining Program Evaluation

- Systematic data collection/ collection of information
- Pre-established criteria including characteristics, activities and outcomes
- A value judgement made about a program and worth
- To support decision making

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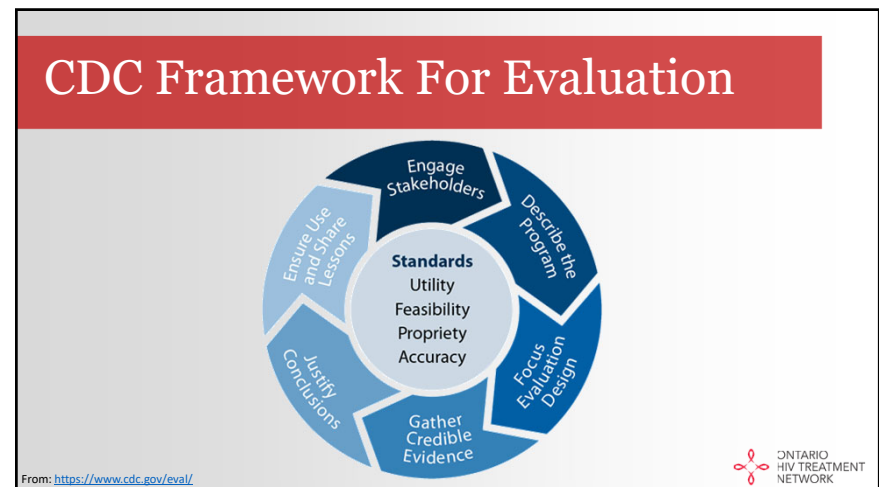
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What are some **benefits** of evaluation?

Why Do Evaluation?

Photograph: Jason Goodman, Toronto

- Is your program making a difference?
- Is it achieving stated objectives?



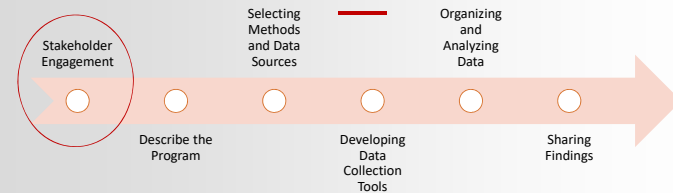
Evaluation Can Be Useful For:



- Program planning
- Program management
- Process improvement
- Quality assurance
- Obtain community support
- Identify emerging needs



Stakeholder Engagement



Engaging Stakeholders

- Identifying Stakeholders
 - Who are the stakeholders?
 - What is their interest in the program?
 - Who makes or influences decisions?
 - Who cares about use?
- Clear purpose of engagement



Stakeholder Identification

From Lusthaus et al (1999)

STAKEHOLDER	CATEGORY	INTERESTS	PARTICIPATION OR ROLE
Clients	Beneficiary	Will use the (evaluation) to benefit from improvements	Information Provider
Board of Directors	Organizational Leadership	Will use the (evaluation) to design new programs, introduce change, or develop future strategies, etc.	Determine how findings of evaluation are used
Clinical Staff	Employees	Will use the results for planning: Will use them to support the project; or; Will use the (evaluation) to design new programs, introduce change, or develop future strategies, etc.	Development of evaluation and determine how findings of evaluation are used

<https://www.betterevaluation.org/methods-approaches/methods/stakeholder-mapping-analysis>

Engagement Plan

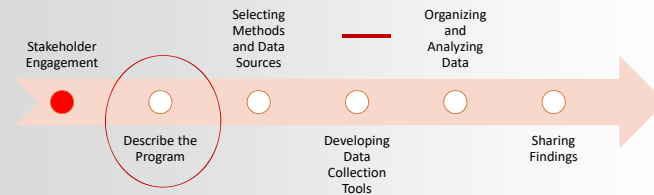
Tailor the approach and design to address engagement objectives and meet stakeholder needs/expectations

Consider:

Participation
Roles
Processes
Documentation
Decision making
Transparency



Describe The Program



Defining Program Goals

What is the program intended to accomplish?

How would you know if it worked?

If the program were a success, what would have happened?

What would have changed?

A **goal** is a broad statement about the long-term expectation of what should happen as a result of the program.



Defining Program Objectives

"Objectives are the stepping stones you pass on the way to reaching your goals."

Personal Goal:

- Get eight hours of sleep every night.

Objectives:

- Stop drinking caffeine in the afternoon
- Set alarms for going to bed and for waking up
- Avoid exercising two hours before going to bed

From: https://www.firstnations.org/wp-content/uploads/2018/12/EvaluationTips_SMARTGoalsObjectives.pdf



What Is A Logic Model?

A **logic model** is a simplified picture showing the relationships between program inputs and the desired outcomes .



What Is A Logic Model?

Inputs

What is invested into the program

Activities

What is done in the program

Outputs

What is created by the activities

Outcomes

Short-term Medium-term Long-term

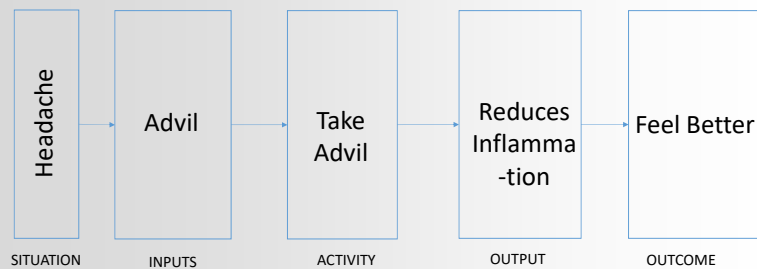
What results from the program

Assumptions

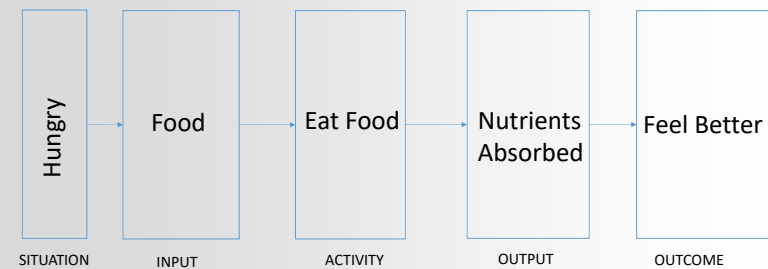
Context



Everyday Logic Models



Everyday Logic Models

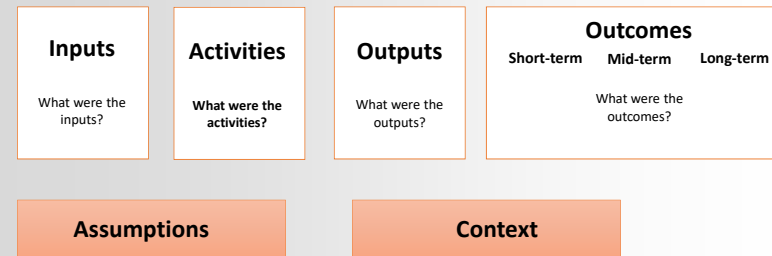


What Is A Logic Model?

- Where are you going?
- How will you get there?
- What is going to tell you that you have arrived?



Rich Uncle Activity



Why Do We Use Logic Models?

To summarize, the logic model:

- Brings detail to broad goals; helps in planning, evaluation, implementation and communication.
- Identify gaps in program logic and clarifies assumptions so success may be more likely.
- Creates buy-in and team work; establishing an understanding and consensus about what the program is and how it will work.



How Do Logic Models Look?

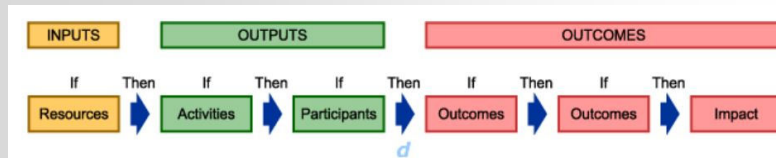
Any shape and form is possible for the logic model.

Logic models can look different depending on:

- Purpose
- Type and complexity of program
- Agency orientation
- Multiple levels and models may be necessary.



If- Then Relationship



From: <https://logicmodel.extension.wisc.edu/>

Sample Logic Model Construction

—

Community Need

A brief description of community and problem being addressed.

Example:

- GBMSM have lower rates of STI screening in HIV care settings compared to other populations

Program Goals

One or two short sentences outlining the main goal and purpose of the

Example:

- To increase the rate of STI testing among GBMSM clients

Rationale

One or two sentences that summarizes the set of beliefs, based on a body of knowledge, about how change occurs in the field with the specific clients (or audience)

Example:

- Research shows that routine STI screenings can be effective in reducing risk of acquiring STI



Inputs

The resources required to deliver the program activities. Resources may include staff, materials, and supplies.

Example:

- 2 FTE coordinators
- 1 FTE manager
- Evaluation team
- Budget: \$8,000

Use the chat to name some other inputs



Activities

This refers to how a program is delivered (e.g., workshops), and to the program content (e.g., module topics). Use the chat to name some activities.

Example:

- Implementing targeting training around testing protocol for staff in the clinic
- Developing a social media campaign to increase testing among GBMSM population



Outputs

This refers to the products of the activities or the volume of a program's actions

- Measures activities, products, or actions.
- Relate to activities for which the project/program has direct control.
- Outputs generally count things produced by the project/program.



Outputs

This refers to the products of the activities or the volume of a program's actions

Use the chat to name some outputs.



Outputs

This refers to the products of the activities or the volume of a program's actions

- Number of staff trained
- Number of GBMSM tested



Outcomes

This refers to the changes or benefits the project or intervention is designed to deliver

- Short term: changes in awareness, knowledge, skills, attitudes, opinions, motivation, intent, etc.
- Medium-term: changes in behaviors, attitudes, decision making, action.
- Long-term: changes in social, economic, civic, environmental conditions, etc.



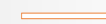
Outcomes

Outcomes: What difference does it make?

Short-term



Mid-term



Long-term

Most immediate and measurable results for participants that can be attributed to the activities

More distant, though anticipated, results of the activities

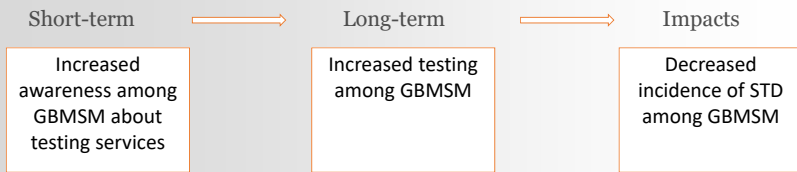
Desired outcomes of long-term implementation of activities that may go beyond the scope of the program



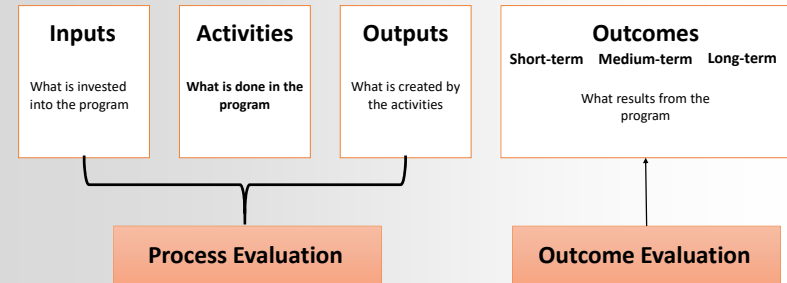
Outcomes

Outcomes: What difference does it make?

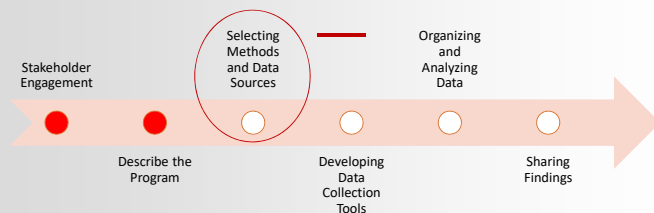
Example: GBMSM and Testing



Logic Model & Evaluation Questions



Selecting Methods and Data Sources



Identifying Data Sources

- What is the difference between selecting data sources and selecting methods?
- What/who are the best data sources?

Indicators

SMART

S Specific
M Measureable
A Achievable
R Relevant
T Time-bound

DUMB

D Doable
U Useable
M Measurable
B Believable

“What information will tell us that change occurred, that the program has been delivered in the intended manner, or that the intended target population has been reached?”



Identifying Appropriate Indicators

- Examples of indicators:
 - Participation rates
 - Efficiency of referral process
 - Wait times
 - Number of referrals
 - Improved scores on a standardized measure or feedback from program participants
- Good indicators are **S.M.A.R.T. indicators**



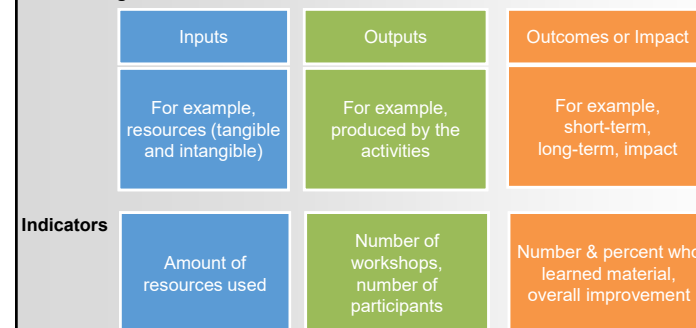
Outcome Indicators

- I'll know it when I see it rule
 - I'll know that the <outcome> has been reached, improved, used....
 - When I see an increase in <indicator>



Generating Indicators

From the logic model



Identifying Outcome Measurement Tools

To narrow the list of outcomes that you plan to measure, it is helpful to ask the following questions:

1. **Is this outcome important to our stakeholders?** Different outcomes may have different levels of importance to different stakeholders. It will be important to arrive at some consensus.
2. **Is this outcome within our sphere of influence?** For example, a sexual health educational program to improve sexual health-related outcomes for youth cannot be held accountable for outcomes related to a drug cessation program to which some of the youth are referred.
3. **Will the program be at the right stage of delivery to produce the particular outcome?** Ensure that the intended outcomes are achievable within the timelines of the evaluation.
4. **Will we be able to measure this outcome?** There are many standardized measures with strong validity and reliability that are designed to measure specific outcomes. The challenge will be to ensure that the selected measure is appropriate for and easy to administer to the target population (e.g., not a heavy time burden, not too complex).



Identifying Process Measures/Tools

- What was the program intended to be?
 - Indented program implementation (delivery)
 - Intended target population (reach)
- What is delivered in reality?
- Identification of gaps between the intended and the actual delivery and reach
- Process measures are often collected from the moment of program entry, while programming is underway, and at program completion.



Validity and Reliability

Validity

Refers to how well a test measures what it is supposed to measure

Reliability

Is the degree to which an assessment tool produces stable and consistent results



Identifying Data Collection Methodology

- When selecting your data collection method, remember to consider:
 - **The purpose of your evaluation**
 - **Participant characteristics**
 - **Available Resources**
 - **Type of information you need**
 - **Interruption to participants**
 - **The program timeline**
 - **How many participants are involved in the program?**



Examples of Data Sources

• Document Review

- Intake forms, activity reports, progress Reports
- Contact log
- Meeting Minutes
- Survey/Interviews with participants, clients or staff

• Quantitative/Numeric Data Sources

- Pre-interim-post or pre-post
- Post-only

• Qualitative Data Sources

- Qualitative data is non-numerical and is especially useful for gathering rich, in-depth, descriptive data from a small sample. Some examples of qualitative data sources include:
- Focus groups
- In-depth Interviews
- Observations and Field Notes
- Arts-based Methods
- Mixed-Methods

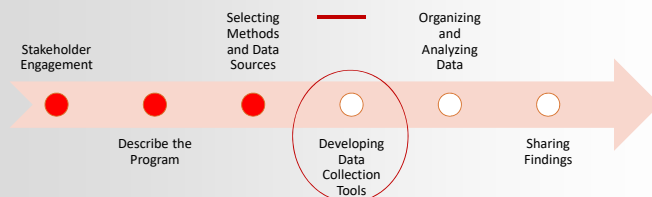


Ethics

- How will you explain the purpose of your evaluation to participants?
- How will you involve and meaningfully engage participants?
 - Is there a mechanism for participants to contribute to the evaluation design and methods used?
 - Are there supports during and after evaluation research?



Developing Data Collection Tools



Surveys

- Define your objectives.
- Select the number and type of participants for your questionnaire.
- Develop questions that clearly communicate what you want to know.
- Decide when to use closed-ended versus open-ended questions.
- Include demographic questions.
- Place questions in a logical order that flows well.
- Pilot test the questionnaire.



Survey Delivery Methods

- In-person
- Phone
- Mail
- Online
- Survey apps



Main Types of Survey Questions

- Open-ended questions
- Closed-ended questions
 - Nominal questions
 - Likert scale questions
 - Rating scale (or ordinal) questions



Nominal Questions

Which browser do you use most often?

- Chrome
- Safari
- Firefox
- Explorer
- Other (please specify_____)



Likert Scale Questions

A 5- or 7- point scale that evaluates a respondent's level of agreement with a statement or the intensity of their reaction towards something.

How strongly do you agree with the following statement?
The service I received was culturally appropriate for my race/ethnicity

- 1 - Strongly disagree
- 2 - Somewhat disagree
- 3 - Neither agree nor disagree
- 4 - Somewhat agree
- 5 - Strongly agree



Rating Scale Questions

Rating scale questions are questions where the answers map onto a numeric scale.

How likely are you to recommend us to a friend or colleague on a scale of 1-10?
1 being not likely to recommend and 10 being very likely to recommend.



Importance of Good Survey Questions

When respondents do not understand the question or its purpose, they:

- Drop out of the survey
- Try to guess what the question is asking, and respond to that
- Select random answers

Good questions → good data

Bad questions → bad data



Importance of Good Survey Questions

- Is conducting a survey the best way to collect the information you need for your evaluation?
- Check for existing data sources that may meet your needs
- Who are you surveying?
- What do you need to know?
 - If I know _____ (fill in the blank with the information you hope to gather through the survey), I will be able to _____ (measure a specific outcome, for example).



Close-ended vs. Open-ended questions

• Close-ended Questions

Please indicate your favorite zoo animal:

- ☐ Lions
- ☐ Giraffes
- ☐ Tigers
- ☐ Bears
- ☐ None of these
- ☐ I don't like going to the zoo

• Open-ended Questions:

What is your favorite animal?



Close-Ended vs. Open-Ended Questions

- Can you think of some pros/cons to using close-ended questions?
- Can you think of some pros/cons to using open-ended questions?

Types of Questions

Open, essay

What other products would you like to see in our online store?
Please tell us other possible products you wish we were selling on our eCommerce platform.

What else would you like us to know?
Any other information you'd like to share with us? We'd be happy to hear from you.

Types of Questions

Closed, scale

Likert scale (disagree/agree)

	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
The cashier was courteous.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The cashier was professional in appearance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I was given a receipt at the end of my transaction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Intensity scales

Using the scale below, indicate to what extent each of the following items presently corresponds to you at the moment when you are completing this survey.

Response	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
1. I am very satisfied with the service I received.	1	2	3	4	5
2. I am very satisfied with the quality of the products I received.	1	2	3	4	5
3. I am very satisfied with the price of the products I received.	1	2	3	4	5
4. I am very satisfied with the location of the store I visited.	1	2	3	4	5
5. I am very satisfied with the staff I interacted with.	1	2	3	4	5
6. I am very satisfied with the overall experience I had.	1	2	3	4	5
7. I am very satisfied with the service I received.	1	2	3	4	5

Semantic Differential Scale

For each pair of adjectives place a mark at the point between them which reflects the extent to which you believe the adjectives describe your behavior.

clean	1	2	3	4	5	6	7	8	9	10	dirty
helpful	1	2	3	4	5	6	7	8	9	10	unhelpful
kind	1	2	3	4	5	6	7	8	9	10	unkind
happy	1	2	3	4	5	6	7	8	9	10	sad
friendly	1	2	3	4	5	6	7	8	9	10	unfriendly
polite	1	2	3	4	5	6	7	8	9	10	impolite
pleasant	1	2	3	4	5	6	7	8	9	10	unpleasant
easygoing	1	2	3	4	5	6	7	8	9	10	difficult
relaxed	1	2	3	4	5	6	7	8	9	10	stressed

Intensity scales

Response	Strongly Disagree	Disagree	Undecided	Agree	Strongly Agree
1. I am very satisfied with the service I received.	1	2	3	4	5
2. I am very satisfied with the quality of the products I received.	1	2	3	4	5
3. I am very satisfied with the price of the products I received.	1	2	3	4	5
4. I am very satisfied with the location of the store I visited.	1	2	3	4	5
5. I am very satisfied with the staff I interacted with.	1	2	3	4	5
6. I am very satisfied with the overall experience I had.	1	2	3	4	5
7. I am very satisfied with the service I received.	1	2	3	4	5

Types of Questions

Closed, multiple answers

Question 4: Where do you use the internet? (Tick all that apply)

☐ At home

☐ At work

☐ In school

☐ At friends/family

☐ Somewhere else

What is the language that your mother first learned at home in childhood?

INTERVIEWER: Multiple responses are accepted only if languages were learned at same time.

11 English

12 French

13 Italian

14 Arabic

15 Spanish

16 Greek

17 Chinese (Cantonese / Mandarin)

18 Portuguese

19 Vietnamese

20 German

21 Expansion slot

22 Other

Types of Questions

Closed, single answer

2 What is this person's sex?

- ☐ Male
☐ Female

4 What is this person's marital status?

Mark "X" one circle only.

- ☐ Never legally married
☐ Legally married (and not separated)
☐ Separated, but still legally married
☐ Divorced
☐ Widowed

Types of Questions

Type	Use
<u>Open, essay</u>	Insufficient knowledge to close a list or need to let respondents use their own scheme
<u>Closed, single answer</u>	Good knowledge to close a list and confidence that a single answer will suffice
<u>Closed, multiple answers</u>	Good knowledge to close a list and requirement for more than one answer
<u>Closed, scale</u>	Multi-dimensional concept based on intensity of feelings
<u>Closed, order of preference</u>	Concept relates to an ordering (analysis difficult)
<u>Closed, mapping</u>	Concept relates to a visual representation that can be analyzed with coordinates
<u>Semi-closed/semi-open</u>	Good knowledge to establish a list but risk of unexpected situations

Tips: Survey Questions

Close-ended Questions: Tips

Please indicate your favorite zoo animal.

- ☐ Lions
☐ Giraffes
☐ Tigers
☐ Bears
☐ Other, please specify:
☐ I like all the animals.
☐ I have never been to the zoo.

A write-in box allows you to collect data about things you didn't think to include in your list.

Have an option so people who are unable to answer the question because it does not apply to them can still provide a response.

Tips: Survey Questions

Which format is better to ask this question and why?

Age Group *

(Select an Option) ▼

(Select an Option)

0-12
13-19
20-29
30-39
40-49
50-59
60-69
70-79
80-89
90-99
100-999

• Age: _____

Tips: Survey Questions

Open-ended Questions: Tips

What is your fondest childhood memory?

Please list the foods you would like to see served in the dining hall next semester.

Size open-ended text boxes appropriately. They cue the respondent as to how much you expect them to write.



Tips: Survey Questions

Please rank your satisfaction with program X on a scale of 1 to 5.



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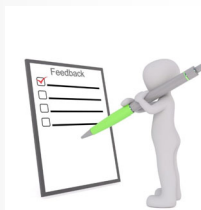
How can we improve this question?



Survey Tips

1. Don't write a leading question

2. Avoid loaded questions



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Survey Tips (cont.)

3. Stay away from double-barreled questions

Double-barreled questions: ask about multiple things in a single question

- How satisfied are you with program X and staff?
What if I am satisfied with program X but not staff?



Survey Tips (cont.)

4. Absolutely do not use absolutes in questions
5. Be clear by speaking your respondent's language

<https://www.youtube.com/watch?v=n34OnLnKzlg>



Focus Groups

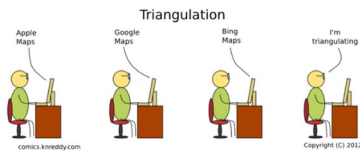


<https://www.naylor.com/associationadviser/tips-for-conducting-focus-groups/>

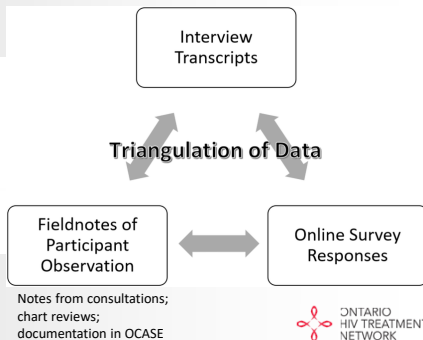


Triangulating Data

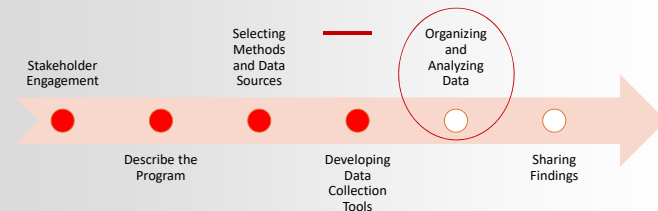
What is Data Triangulation?



Triangulation of Data



Organizing and Analyzing Data



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Quantitative and Qualitative Data




Qualitative

Quantitative

<https://spottheworld.blogspot.com/2021/05/critically-evaluate-research.html>

Data Organization




Data pieces

Organized dataset

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Coding




Dataset

Dataset with assigned codes

Coding refers to grouping and assigning values to responses from the survey.

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Quantitative Data Analysis Methods

 **Descriptive Analysis**

The first level of analysis, this helps researchers find absolute numbers to summarize individual variables and find patterns.

A few examples are...

- **Mean:** numerical average
- **Median:** midpoint
- **Mode:** most common value
- **Percentage:** ratio as a fraction of 100
- **Frequency:** number of occurrences
- **Range:** highest and lowest values





 **Inferential Analysis**

These complex analyses show the relationships between multiple variables to generalize results and make predictions.

A few examples are...

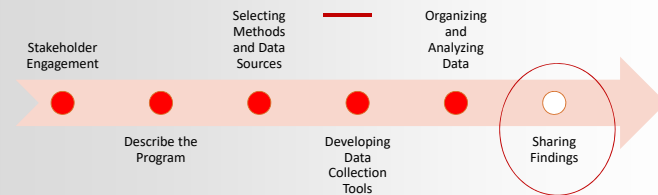
- **Correlation:** describes the relationship between 2 variables
- **Regression:** shows or predicts the relationship between 2 variables
- **Analysis of variance:** tests the extent to which 2+ groups differ

Qualitative Data Preparation and Analysis

- 
Get familiar with the data
 Start by reading the data several times to get familiar with it and start looking for basic observations or patterns. This also includes transcribing the data.
- 
Revisit research objectives
 Revisit the research objective and identify the questions that can be answered through the collected data.
- 
Develop a framework
 Identify broad ideas, concepts, behaviors, or phrases and assigns codes to them. This is helpful for structuring and labeling the data.
- 
Identify patterns and connections
 Start identifying themes, looking for the most common responses to questions, identifying data or patterns that can answer research questions, and finding areas that can be explored further.



Sharing Findings



Defining Communication Purpose

Questions About Stakeholders/Audiences	Answers
1. Do they need to be informed about evaluation decisions? If so, when and for what reason?	<input type="checkbox"/> To build awareness <input type="checkbox"/> To gain support <input type="checkbox"/> To show respect
2. Do they need to review interim or final findings? If so, when and for what reason?	<input type="checkbox"/> To review evaluation progress <input type="checkbox"/> To learn and improve <input type="checkbox"/> To promote dialogue and understanding among partners
3. Do they need to be involved in decision making? If so, when and for what reason?	<input type="checkbox"/> To assess the likelihood of future support <input type="checkbox"/> To help develop recommendations <input type="checkbox"/> To ensure use of the recommendations

Figure from: <https://www.crs.org/sites/default/files/short-cuts-communicating-and-reporting-on-an-evaluation.pdf>



Selecting Communication Method

Questions for Stakeholders/Audiences	Answers
1. What is their familiarity with the program or the project being evaluated?	<input type="checkbox"/> Very familiar <input type="checkbox"/> Somewhat familiar <input type="checkbox"/> Not at all familiar
2. What is their experiences using evaluation findings?	<input type="checkbox"/> Long experience <input type="checkbox"/> Some experience <input type="checkbox"/> No experience
3. What is their reading ability?	<input type="checkbox"/> High <input type="checkbox"/> Mid <input type="checkbox"/> Low or non-reader (illiterate)
4. What language(s) do they use to communicate?	<input type="checkbox"/> _____ for writing <input type="checkbox"/> _____ for reading
5. How accessible are they?	<input type="checkbox"/> Easily <input type="checkbox"/> With some effort <input type="checkbox"/> Isolated

Figure from: <https://www.crs.org/sites/default/files/short-cuts-communicating-and-reporting-on-an-evaluation.pdf>

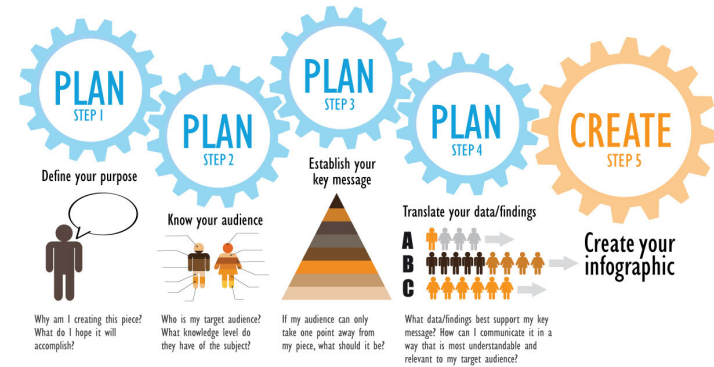


What should be included in a written report?

- Description of the program, including its goals, target population, and activities
- Overview of the evaluation questions.
- Explanation of the methods and the procedures used to collect and analyze data.
 - Description of the evaluation participants (such as sample size and strategies used to obtain consent)
- Results
- Outline of the strengths and limitations of the evaluation methodology
- Conclusions and recommendations
- Executive summary to summarize key points



5 STEPS to TRANSLATE EVALUATION FINDINGS to INFOGRAPHICS



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How OHTN can support

- Epidemiology – data on new diagnoses, testing, care cascade, regional breakdowns
 - Ontario HIV Epidemiology and Surveillance Initiative www.ohesi.ca
- OHTN Cohort Study - largest community-governed HIV cohort in Ontario and is one of the largest cohort studies in North America
 - Clinical data
 - Psychosocial and behavioural data
 - Serological and viral load test data
- OHTN Rapid Response service
- OHTN HIV Endgame Funding Program
- OHTN Evaluation Consultation support

