

# Evaluation 101

CHRONIC DISEASE PARTNERS  
AND BETTER CHOICES,  
BETTER HEALTH® SD  
ANNUAL MEETING

OCTOBER 12, 2022



# Learning Objectives:

- Understand basic evaluation concepts
- Learn the steps of a typical program evaluation plan
- Identify how evaluation can direct program activities
- Apply evaluation tools and techniques to your program

Do you think like an evaluator?

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# Think like an Evaluator

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- Pathologically Curious
- Annoyingly Observant
- Highly Analytical
- Embrace Change



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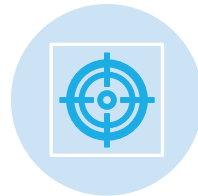
# What is program evaluation?



Planned activities intended to measure a specific aspect of a program.



Designed around questions related to a program's practices, activities, structure, or outcomes.



Gathering information to measure the merit, worth, and significance of something.



Intended for utilization

**“The purpose of evaluation is to IMPROVE, not prove.”**

- D.L. Stufflebeam

# Why do I need to evaluate?

## TO INFORM DECISIONS ABOUT THE PROGRAM

- Identify what is not working and why
- Improve implementation of current efforts
- Gather information on the approach to share or expand work
- Communicate impact
- May be required
- Demonstrate impact to clients or funding agency

Without evaluation, this is how you look to funders.

You give us money →

Where the Magic happens...

→ We ask you for more money.

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# Steps to Conducting an Evaluation



# Plan for the Evaluation

## Choose a leader.

### Internal



- Understands the program and context
- Connection to partners and staff
- Makes use of existing staff time (\$)
- May not be as experienced in evaluation
- Often perceived as not objective

### External



- Technical expertise in evaluation
- Outside (new) perspective
- More objective (typically)
- Can be expensive
- Time needed to learn the program

# Plan for Evaluation

## Identify your team.

*Who has an interest in the evaluation?*

*Whose perspective is needed?*



The evaluation team should include individuals who:

- Will use the evaluation results
- Support or maintain the program
- Are served by the program



# Plan for Evaluation

## Example of an Evaluation Team

<b>Person</b>	<b>Role in Evaluation</b>	<b>Information of Interest</b>
<i>Owner</i>	<i>Key team member</i>	<i>Factors contributing to declining membership, ways to increase membership</i>
<i>Client Services Manager</i>	<i>Key team member</i>	<i>Client satisfaction</i>
<i>Personal Trainer</i>	<i>Key team member</i>	<i>Client satisfaction, ways to increase client engagement</i>
<i>Group Fitness Instructor</i>	<i>Contributing team member</i>	<i>Client satisfaction, ways to increase client engagement</i>
<i>Accountant</i>	<i>Information source, reviewer</i>	<i>Financial</i>
<i>Long-term client</i>	<i>Information source, data meaning making, dissemination</i>	<i>New and existing services</i>
<i>New client</i>	<i>Information source, data meaning making, dissemination</i>	<i>New and existing services</i>

# Application to Your Program

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PLAN: LEADER AND TEAM



# Plan for the Evaluation

Describe your program.

INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
<i>Resources that go into the program</i>	<i>Work that occurs as part of the program</i>	<i>Direct results of the work that occurs</i>	<i>Immediate effects of the program</i>	<i>Effects of your program that take longer to achieve</i>	<i>Effects of the program that take years to achieve</i>

**Context/Environment Considerations:**

# Plan for the Evaluation

## Example Logic Model: ABC Fitness

INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
<ul style="list-style-type: none"> <li>• Fitness facility with open space and group fitness rooms</li> <li>• Long-term personal training staff</li> <li>• Variety of group fitness instructors</li> <li>• Long-term members</li> </ul>	<ul style="list-style-type: none"> <li>• 1:1 fitness assessments</li> <li>• Group classes</li> <li>• Variety of cardio equipment</li> <li>• Variety of weights</li> <li>• Personal training sessions</li> <li>• Friendly competitions</li> <li>• On-site customer service</li> </ul>	<ul style="list-style-type: none"> <li>• Use of facility by members</li> <li>• Participation in competitions</li> <li>• Participation in training sessions</li> <li>• Participation in fitness assessments</li> </ul>	<ul style="list-style-type: none"> <li>• Improved understanding of physical activity practices by members</li> <li>• Increased interest in health</li> <li>• Improved engagement in physical activity</li> <li>• Improved self-confidence in physical activity</li> </ul>	<ul style="list-style-type: none"> <li>• Improved physical strength</li> <li>• Improved physical endurance</li> <li>• Increased use of the Fitness Center</li> </ul>	<ul style="list-style-type: none"> <li>• Physical health changes: blood pressure, body weight, sleep</li> <li>• Reduction in medical claims</li> <li>• Reduction in sick leave</li> <li>• Improved mental wellness</li> </ul>

Context/Environment Considerations: Rural population must travel to facility; competing facility in nearest town

# Application to Your Program

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PLAN: LOGIC MODEL

# Plan for Evaluation

Identify your  
purpose.

*What is driving the need for  
evaluation now?*



Identify need or  
approach



Improve program



Measure impact



# Plan for Evaluation

## Example Evaluation Purpose Statement

*ABC Fitness has been serving adults in the greater Sioux Falls area for the past five years through onsite exercise classes, equipment, and personal training sessions.*

*Memberships numbers have declined in the past six months resulting in financial challenges for the fitness center.*

*The purpose of this evaluation is to identify client characteristics, benefits of participation, and feedback on services to guide expanded fitness offerings and better target new, diverse clientele.*

Description

Why

Plan

# Application to Your Program

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PLAN: PURPOSE



# Steps to Conducting an Evaluation



# Design an Evaluation Process

Evaluation Question	Indicator(s)	Data Source	Data collection method	Timeframe	Data Analysis	Person Responsible
<i>What you want to know</i>	<i>Specific, observable, and measurable characteristic or change that shows progress toward achieving a goal or outcome</i>	<i>Where will you find or collect data.</i>	<i>How you will collect the data</i>	<i>Start and end date or data collection, or period assessed</i>	<i>The type of analysis will you apply to the data</i>	<i>Person or role responsible for collecting the data</i>

Evaluation is a structured and systematic process.

# Design an Evaluation Process

*The purpose of this evaluation is to identify client characteristics, benefits of participation, and feedback on services to guide expanded fitness offerings and better target new, diverse clientele.*

Evaluation Question	Indicator(s)
<i>What you want to know</i>	<i>Specific, observable, and measurable characteristic or change that shows progress toward achieving a goal or outcome</i>
<p>Example: Who is utilizing ABC Fitness services?</p> <p>PROCESS</p>	<ul style="list-style-type: none"> <li>Demographic characteristics (age, race, gender, residence location) of members</li> <li>Number of check-ins by members' age group, gender, race and location</li> </ul>
<p>What benefits have our clients experienced?</p> <p>OUTCOME</p>	<ul style="list-style-type: none"> <li>Member-reported frequency of exercise</li> <li>Member-reported health benefits (blood pressure, weight, sleep)</li> </ul>
<p>To what extent are the services meeting the needs of clients?</p> <p>OUTCOME</p>	<ul style="list-style-type: none"> <li>Level of overall reported satisfaction among members</li> <li>Level of satisfaction by service component.</li> </ul>
<p>What types of additional services are of interest to members?</p>	<ul style="list-style-type: none"> <li>List of member-identified service enhancements. FORMATIVE</li> </ul>

# Application to Your Program

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QUESTIONS AND INDICATORS





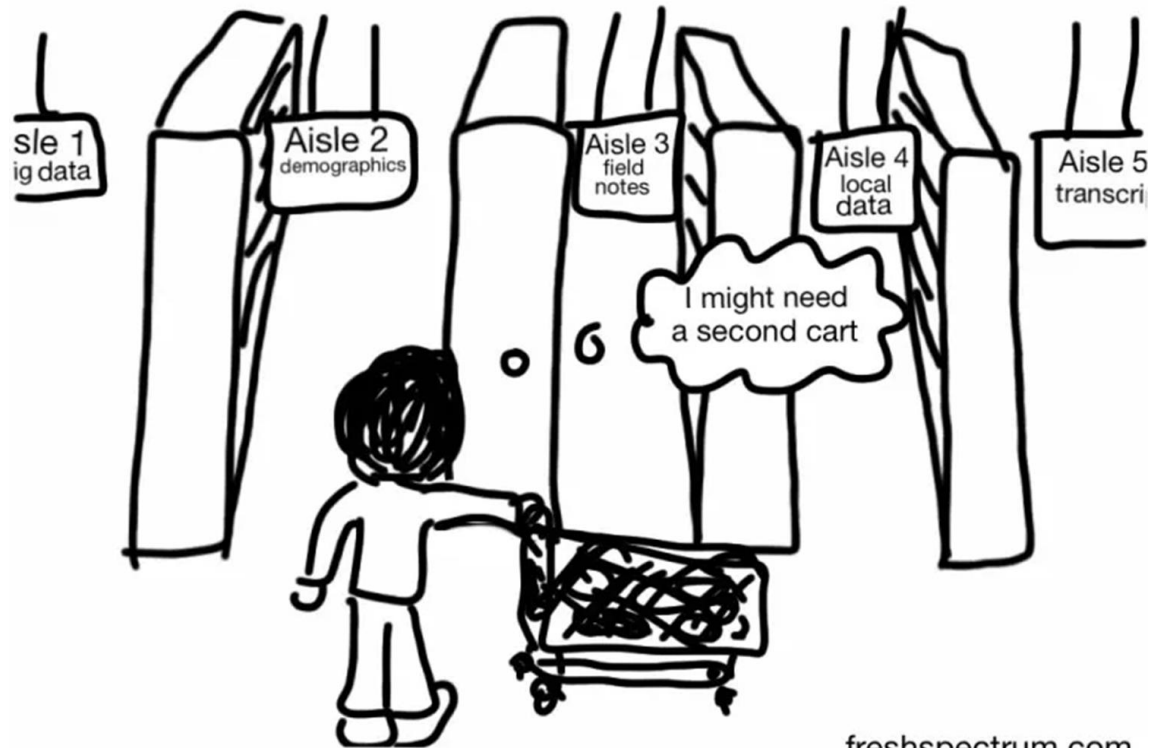
# Steps to Conducting an Evaluation

<https://missionriev.in/>



# Collect Information

Like an evaluator in a data store

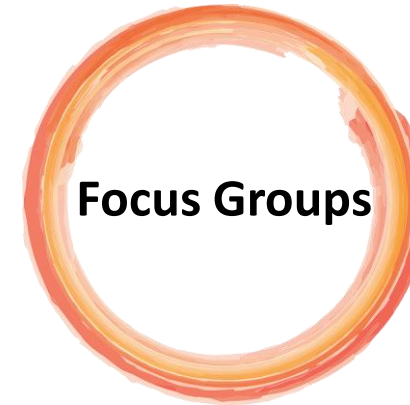


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Identify a data source for your indicator.

- Existing data
- New data collection

# Collect Information



*PROS*

*CONS*

<ul style="list-style-type: none"><li>• In-depth information</li><li>• Freedom of flexibility</li><li>• Accurate data</li></ul>	<ul style="list-style-type: none"><li>• Cost-effective</li><li>• Respondent identity can be protected</li><li>• Easy to analyze</li><li>• Questionnaires offer actionable data</li><li>• Easy to administer to large numbers</li></ul>	<ul style="list-style-type: none"><li>• Cost-effective when compared to one-on-one interviews</li><li>• Information obtained is usually very detailed</li></ul>	<ul style="list-style-type: none"><li>• Easy to administer</li><li>• Universally accepted practice</li><li>• Appropriate for certain situations</li></ul>
<ul style="list-style-type: none"><li>• Time-consuming</li><li>• Expensive to collect</li></ul>	<ul style="list-style-type: none"><li>• Questions may be left unanswered</li><li>• Respondents may lose interest midway</li></ul>	<ul style="list-style-type: none"><li>• Requires interviewer training</li><li>• A few vocal voices may drown out the rest</li></ul>	<ul style="list-style-type: none"><li>• Bias may arise</li><li>• Validity cannot be predicted accurately</li></ul>

# Collect Information

## Example of Data Sources in the Evaluation Plan

Evaluation Question	Indicator(s)	Data Source
<p><b>Example:</b> Who is utilizing ABC Fitness services?</p>	<ul style="list-style-type: none"><li>• Demographic characteristics (age, race, gender, residence location) of members</li><li>• Number of check-ins by members age group, gender, race and location</li></ul>	<ul style="list-style-type: none"><li>• Client profile database</li><li>• Badge access scan report by member</li></ul> <p>EXISTING</p>
<p>To what extent are the services meeting the needs of clients?</p>	<ul style="list-style-type: none"><li>• Level of overall reported satisfaction among members, and level of satisfaction by service component.</li></ul>	<ul style="list-style-type: none"><li>• Member survey</li></ul> <p>NEW</p>

# Collect Information

Data Source	Data collection method	Timeframe
<i>Where will you find or collect data.</i>	<i>How you will collect the data</i>	<i>Start and end date of data collection, or period assessed</i>
<b>EXAMPLE:</b> <ul style="list-style-type: none"><li>• Client profile database</li><li>• Badge access scan report by member</li></ul>	<ul style="list-style-type: none"><li>• Report of individual demographic information will be pulled for all clients in 2021.</li><li>• Number of badge access scans by member will be pulled and linked to the demographic information.</li></ul>	Member and badge access data will be pulled in February 2022 for calendar year 2021.
<ul style="list-style-type: none"><li>• Member survey</li></ul>	<ul style="list-style-type: none"><li>• An anonymous member survey will be developed by the evaluation team. It will be distributed to all current members by mail and available on-site. The survey will assess satisfaction with various services.</li></ul>	The member survey will be mailed out on March 1, and available onsite from March 1 to March 20, 2022.

Develop a data collection method and timeframe.

# Application to Your Program

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DATA SOURCES, COLLECTION METHODS AND TIMELINE





# Collecting Information

## Pause to assess the fit of the data.



- *Does this align with the evaluation purpose?*
- *Is the scope appropriate?*
- *Is it feasible?*
- *Will the data be high quality?*

# Steps to Conducting an Evaluation

<https://missionriev.in/>



# Analyze Information

Identify an analysis plan before you gather information.

Data Analysis	Person Responsible
<i>The type of analysis will you apply to the data</i>	<i>Person or role responsible for collecting the data</i>
<ul style="list-style-type: none"><li>• Satisfaction ratings will be aggregated across respondents for an overall mean rating, and mean rating by service type.</li><li>• Open-ended responses will be analyzed for themes to identify barriers and gaps in services.</li><li>• Results will be shared with the ABC Fitness team and all members in a summary report.</li></ul>	Collection: Client Service Manager  Analysis: Owner

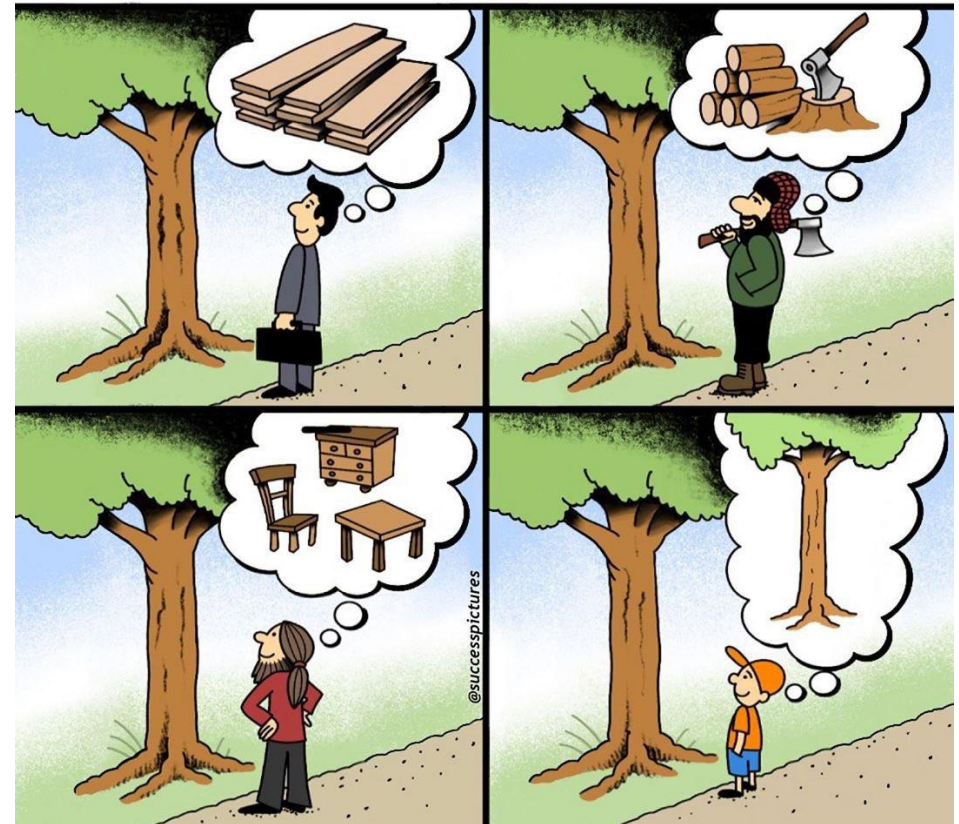
# Analyze Information

Create a data summary and get feedback.



## Perspective.

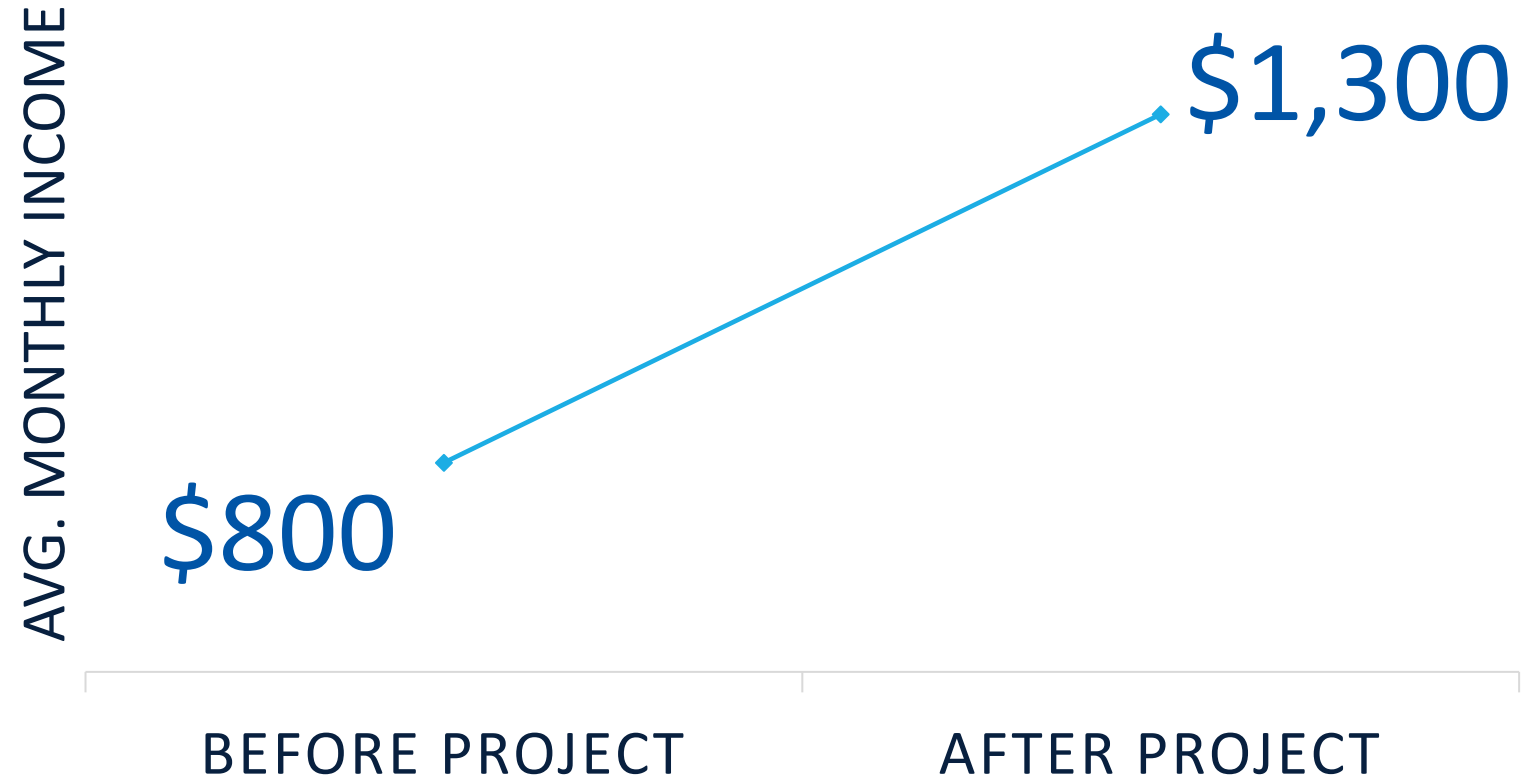
@successpictures



# Analyze Information

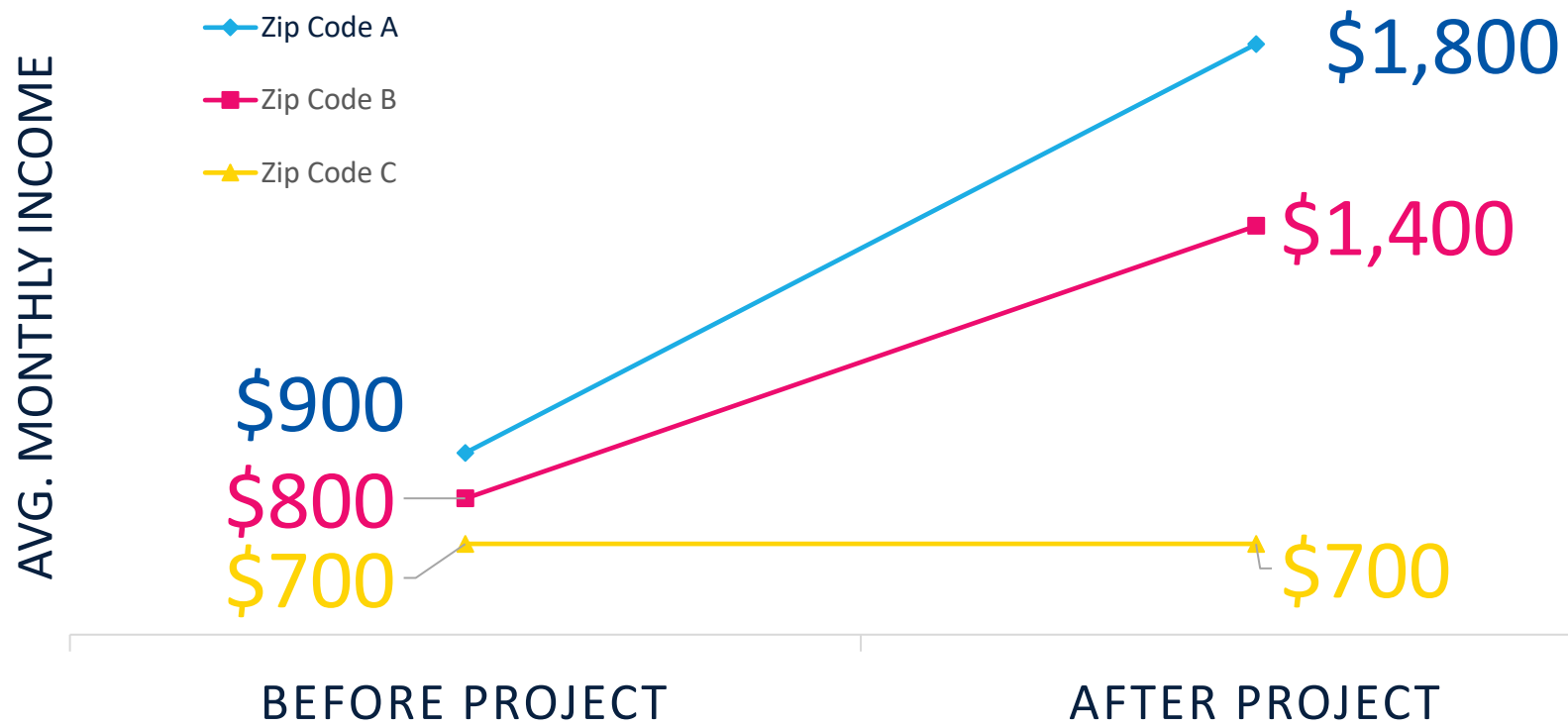
Consider equity in the analysis.

*Does our project increase average monthly income?*



# Analyze Information

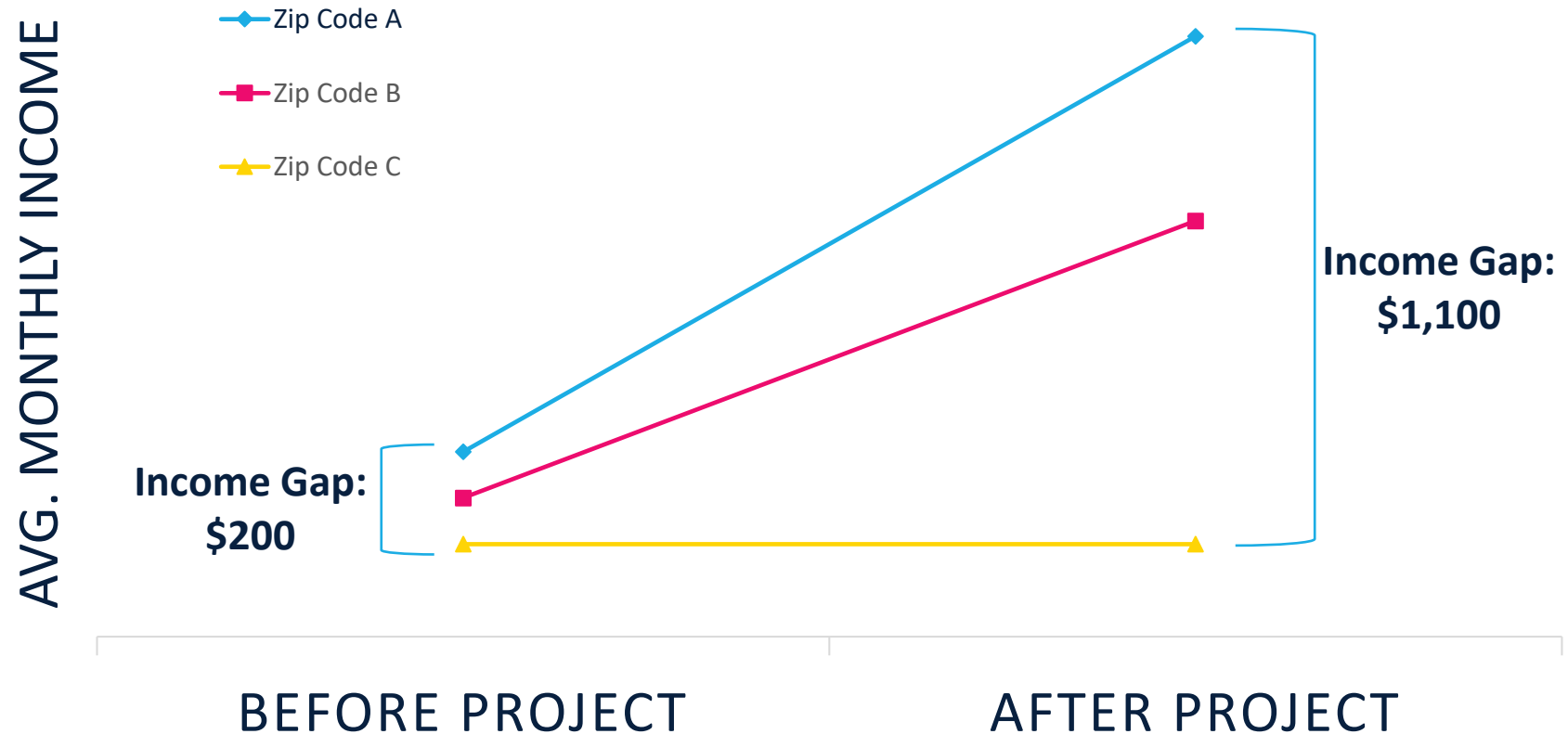
*Does our project increase average monthly income?*





# Analyze Information

*Does our project increase average monthly income?*



# Steps to Conducting an Evaluation



# Take Action



Answer your  
evaluation  
question(s).



Make  
recommendations.

# Take Action

## MEDIUM

Social Media

Media interviews

Blogs, web features, data visualizations

Op-eds and commentaries

Exchange with advocates and practitioners

Roundtables and policy convenings

Policy briefs and fact sheets

Congressional testimony

Peer-reviewed journal articles

Technical reports with  
methodological details

## COMPLEXITY

## AUDIENCE



URBAN INSTITUTE

# Share your evaluation.

# Steps to Conducting an Evaluation

<https://missionriev.in/>





# Evaluation



<https://www.surveymonkey.com/r/JenniferKerkvliet>

Questions?

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