Chronic Disease Evaluation Series

Lesson 1
Focusing Your Evaluation Design

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CSTE

February 19, 2015

2pm – 3pm Eastern

Webinar Housekeeping

- Please note that today's webinar is being **recorded**
  – The presentation slides and recording will be available on the CSTE website in the Webinar Library (http://www.cste.org/?page=WebinarLibrary)

- All phone lines have been placed on **mute.**
  – To hear the audio, Dial in number: **877-668-4490**; Access code: **797 214 704**

- After the speakers' remarks, there will be a question-and-answer period
  – To ask a question, please use the **Q&A box** on the **right side of your screen**

- When the webinar ends, you will be redirected to an evaluation
  – Please complete the evaluation!

To Ask a Question

- Open the Q&A box on the right side panel on your screen

- Type a question

- Send it to All Panelists

- Questions will be answered during the Q&A period

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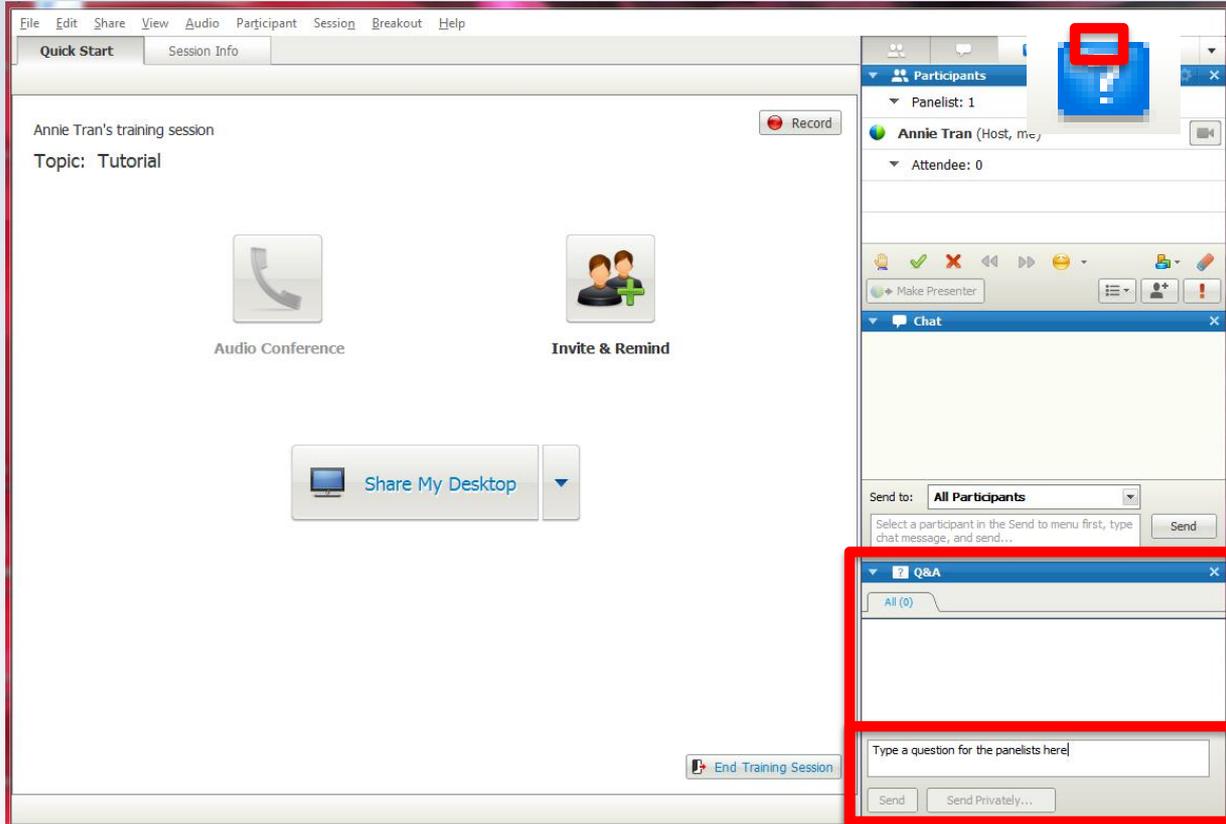
Overview

- **Introductions**

- **Discussion board**

  - **http://cste.freeforums.net/**

  - **Create account**

  - **References, Resources, Discussions**

- **Purpose of the series**

  - **Provide a BROAD overview of evaluation**

Poll

- **How many years have you been involved with evaluating programs/projects/policies?**

- **What is your current role with evaluation?**

Course

- **4 webinar series**

  - **Focusing your design – February 2015**

    - **Practice/discuss design strengths and weaknesses/challenges**

  - **Approaches to evaluation – March 2015**

    - **Explain evaluation approaches and rationale for selection of particular approaches**

  - **Outcome/process evaluation – April 2015**

    - **Identifying relevant evaluation approach and questions**

  - **Data visualization and reporting – May 2015**

    - **Selecting best data representation and report styles**

Beginning....

When do we start?

    Sooner the better

Where do we start?

    Program and Evaluation Planning

    Implementing

    Collecting

    Analyzing

    Reporting

Lesson Overview

- **Decide the purpose of the evaluation**
  - Primary purpose
  - Secondary purposes
- **Identify and engage key stakeholders**
- **Revisit purpose of the evaluation with stakeholders**
- **Determining what is possible and feasible**
  - What will be most useful to stakeholders?
  - What is feasible? Consider costs, time, engagement

Poll

- **When is the best time to begin planning the evaluation?**

- **In your experience, when do programs start planning evaluations?**

Determining Evaluation Purpose

- **Defining the program/system being evaluated**

- **Defining the evaluation purpose**
  - External dictates (Funders, Grant requirements)
  - Program needs (Planning, Sustainability)
  - Agency needs (Planning, Programming decisions)

- **Engaging stakeholders and including Stakeholder feedback**

- **Ensuring purpose, utility, and feasibility inform evaluation planning**

Defining Program and Evaluation

- **How will the evaluation be used?**
  - Who are the users?
  - Multiple uses and users
- **Role of the evaluator in determining/defining the evaluation purpose**
- **Useful tools**
  - Logic models
  - Decision Trees
  - Log frames
  - Flow charts

Poll

- **Which planning tools have you used previously?**

  - **Logic models**

  - **Decision Trees**

  - **Log frames**
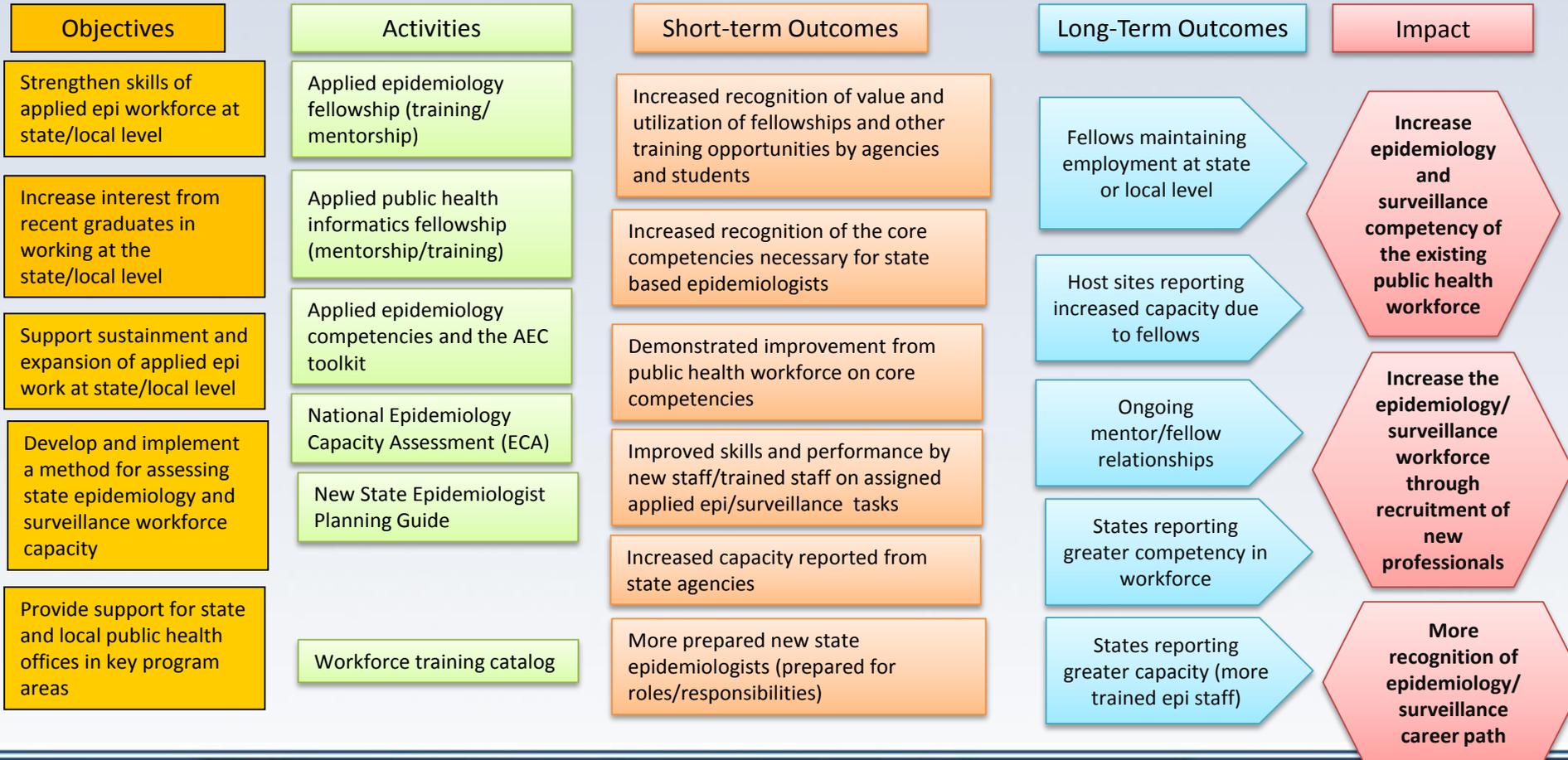
  - **Flow charts**
  - **Other**

Workforce Programmatic Logic Model

Program Areas

- Applied Epidemiology Fellowship
- Workforce Training Catalog
- Applied Public Health Informatics Fellowship
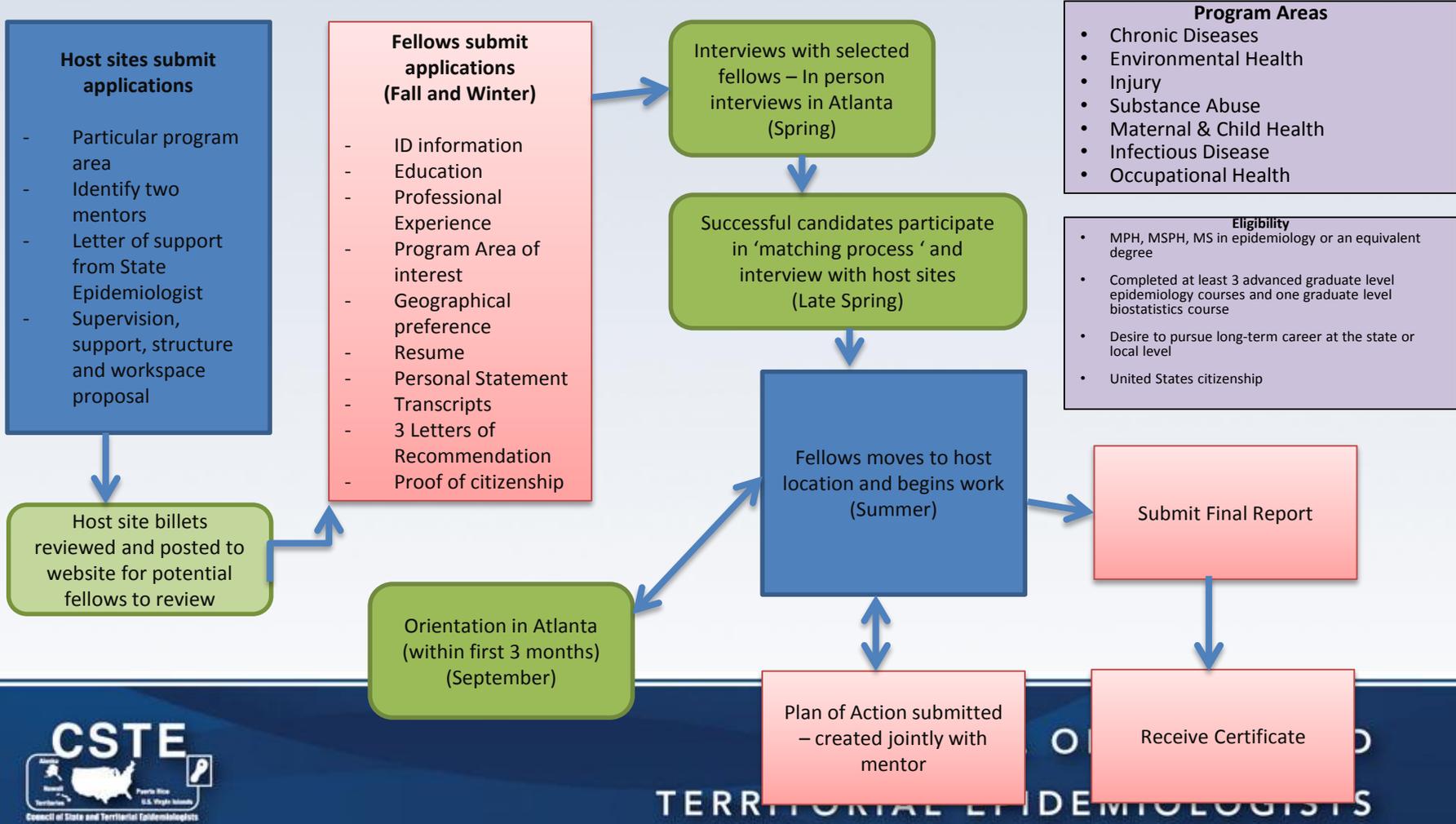- Epidemiology Capacity Assessment (ECA)
- Trainings and Resources
- New State Epidemiologists Orientation

Objectives

- Strengthen skills of applied epi workforce at state/local level
- Increase interest from recent graduates in working at the state/local level
- Support sustainment and expansion of applied epi work at state/local level
- Develop and implement a method for assessing state epidemiology and surveillance workforce capacity
- Provide support for state and local public health offices in key program areas

Activities

- Applied epidemiology fellowship (training/ mentorship)
- Applied public health informatics fellowship (mentorship/training)
- Applied epidemiology competencies and the AEC toolkit
- National Epidemiology Capacity Assessment (ECA)
- New State Epidemiologist Planning Guide
- Workforce training catalog

Short-term Outcomes

- Increased recognition of value and utilization of fellowships and other training opportunities by agencies and students
- Increased recognition of the core competencies necessary for state based epidemiologists
- Demonstrated improvement from public health workforce on core competencies
- Improved skills and performance by new staff/trained staff on assigned applied epi/surveillance tasks
- Increased capacity reported from state agencies
- More prepared new state epidemiologists (prepared for roles/responsibilities)

Long-Term Outcomes

- Fellows maintaining employment at state or local level
- Host sites reporting increased capacity due to fellows
- Ongoing mentor/fellow relationships
- States reporting greater competency in workforce
- States reporting greater capacity (more trained epi staff)

Impact

- **Increase epidemiology and surveillance competency of the existing public health workforce**
- **Increase the epidemiology/ surveillance workforce through recruitment of new professionals**
- **More recognition of epidemiology/ surveillance career path**

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CDC/CSTE Fellows: The Future of Applied Epidemiology Fellowship Flow Chart

Program Purpose

The CDC/CSTE Applied Epidemiology Fellowship was created in 2003 to strengthen the workforce in applied epidemiology at state and local health agencies. CSTE and CDC, in collaboration with the Association of Schools of Public Health (ASPH) established the two-year fellowship program to give recent MPH graduates from schools of public health advanced training opportunities and preparation for successful careers as state and local epidemiologists.

Host sites submit applications

- Particular program area
- Identify two mentors
- Letter of support from State Epidemiologist
- Supervision, support, structure and workspace proposal

Fellows submit applications (Fall and Winter)

- ID information
- Education
- Professional Experience
- Program Area of interest
- Geographical preference
- Resume
- Personal Statement
- Transcripts
- 3 Letters of Recommendation
- Proof of citizenship

Interviews with selected fellows – In person interviews in Atlanta (Spring)

Successful candidates participate in 'matching process' and interview with host sites (Late Spring)

Program Areas
- Chronic Diseases
- Environmental Health
- Injury
- Substance Abuse
- Maternal & Child Health
- Infectious Disease
- Occupational Health

Eligibility
- MPH, MSPH, MS in epidemiology or an equivalent degree
- Completed at least 3 advanced graduate level epidemiology courses and one graduate level biostatistics course
- Desire to pursue long-term career at the state or local level
- United States citizenship

Host site billets reviewed and posted to website for potential fellows to review

Fellows moves to host location and begins work (Summer)

Submit Final Report

Orientation in Atlanta (within first 3 months) (September)

Plan of Action submitted – created jointly with mentor

Receive Certificate

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OBJECTIVES	INDICATOR	DATA SOURCE	ASSUMPTION
Goal (or long term outcome)			
Purpose (or intermediate outcome)			
Results (or immediate outcome of the project)			
Output Tangible products or services that are to be delivered to achieve the purpose	*Then this should be achieved*		
Activities The key activities required to produce each output	*If this occurs...*		*And this holds true...*

* Community Sustainability Engagement Evaluation Toolbox: http://evaluationtoolbox.net.au/

Defining Evaluation Purpose

- **Inform program selection/adjustments**
- **Demonstration of need**
- **Demonstration of impact**
- **Inform practice**
- **Grants/funding opportunities**
- **Demonstrate best practices**
- **Assessing progress**
- **Relationships with partners**

Determining Evaluation Type

- **Formative/Summative**
- **Needs Assessment**
- **Process Evaluation**
- **Outcome Evaluation**
- **Economic Evaluation**
- **Quality Improvement**
- **Program Evaluation**
- **System Evaluation**
- **Strategy Evaluation**

- **Based on what you need to know**

- **Potentially utilize multiple types of evaluation**

- **Interconnectedness between types of evaluation**

Poll

Which of the following can/should be evaluated?

- Organizational progress toward set benchmarks
- Impact of a law/policy of public health/safety
- Effectiveness of a new/novel training approach
- Disproportionality of vaccine distribution

"What gets measured Gets Done"…. Unknown

Identify and Engage Stakeholders

Who are your key stakeholders?

- **Program staff/administrators**

- **Program recipients**

- **Agency administrators**

- **Funders**

- **Legislators**
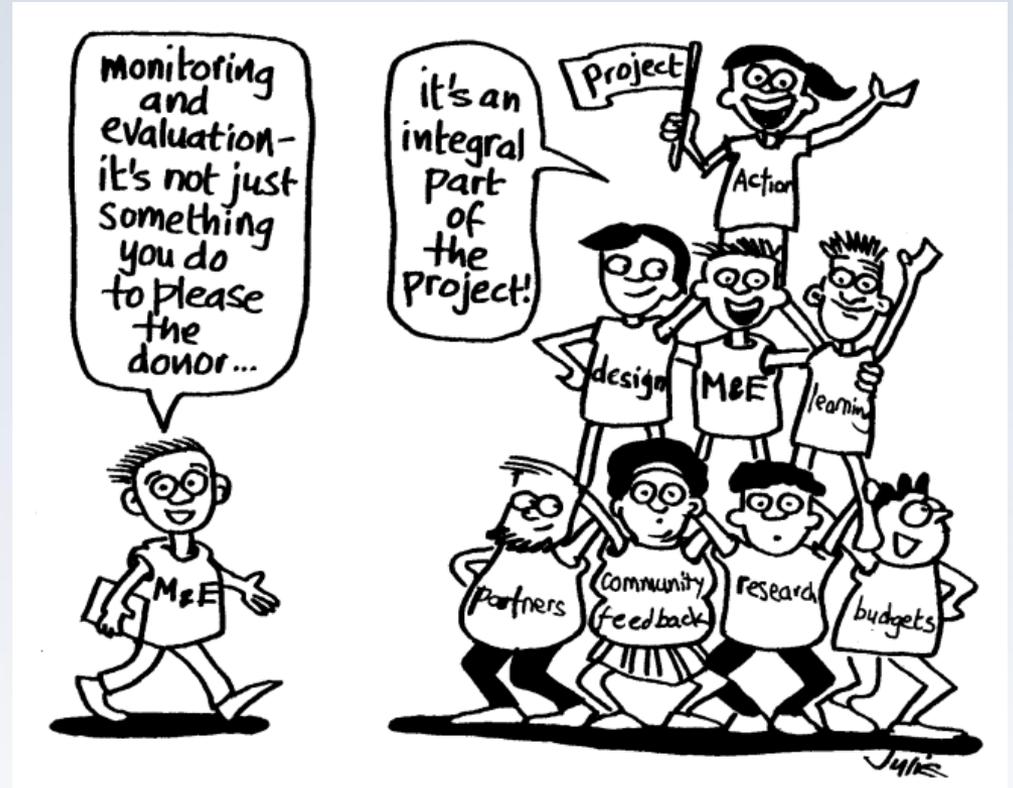
Different stakeholders/Different needs

Macro level

Policy and planning decisions

Developing established best practices

Determining impact on community/jurisdiction

Program Level

Sustainability planning

Future funding decisions

Ways to improve program/services offered

Individual Level

Impact on current and future participants

Ability to access program/services

Ways to improve program/services offered

Engaging Stakeholders

- **Be Present – Meet and engage in person in person when possible**

- **Meet them where they are at**

- **Value stakeholder knowledge and feedback**

- **Provide safe space and acknowledgement of challenges in stakeholder relationships**

- **Maintain regular contact with key contacts, program leads**

- **Engage with community leads and partners**

Engaging Stakeholders

- **Consistent engagement**

- **Provide feedback to stakeholders, before the end of the project**

- **Recognize stakeholder contributions and needs**

- **Seek ways to provide win-win experiences**

- **Use communication tools (logic models, etc) in an approachable way**

Engaging Stakeholders
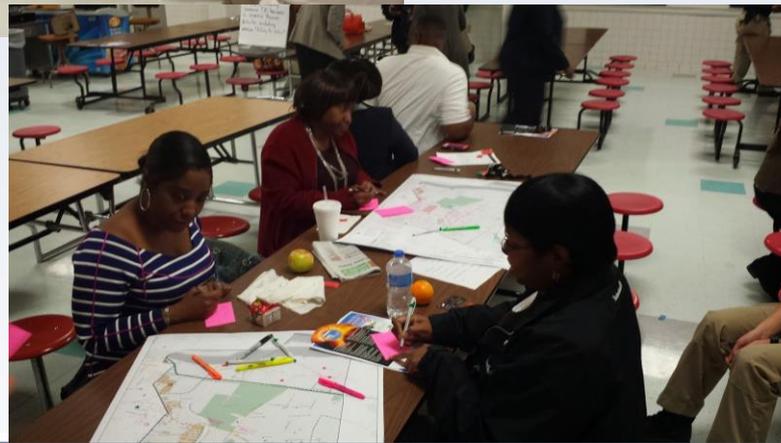
Poll

What is the biggest challenge you have encountered with engaging stakeholders?

Why is it Important to Revisit Evaluation Plan?

Ensure meeting stakeholder needs

Prioritizing stakeholder needs and wants

Changes to stakeholders

Adapting to changes in circumstances

Adjustments based on feedback

Program selection/adjustments

Support relationships with partners

Why is it Important to Revisit Evaluation Plan?

Providing stakeholders opportunity to inform plan

> **May identify challenges**

> **Provide unique perspective or ideas**

Build partnerships and evaluation support

Provide ongoing, continuity of communication among partners

CDC's Six-Step Evaluation Framework
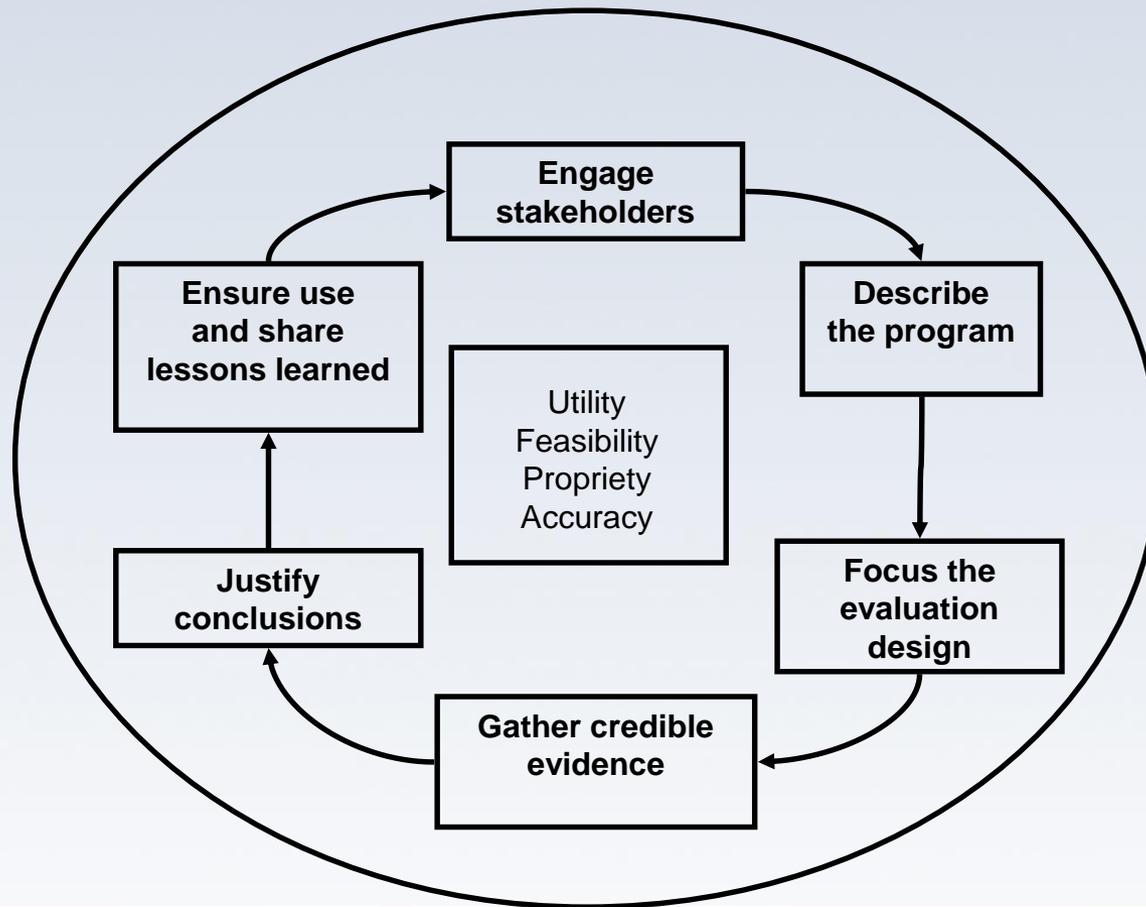
Circle of Evaluation Implementation

The Warner Center
University of Rochester
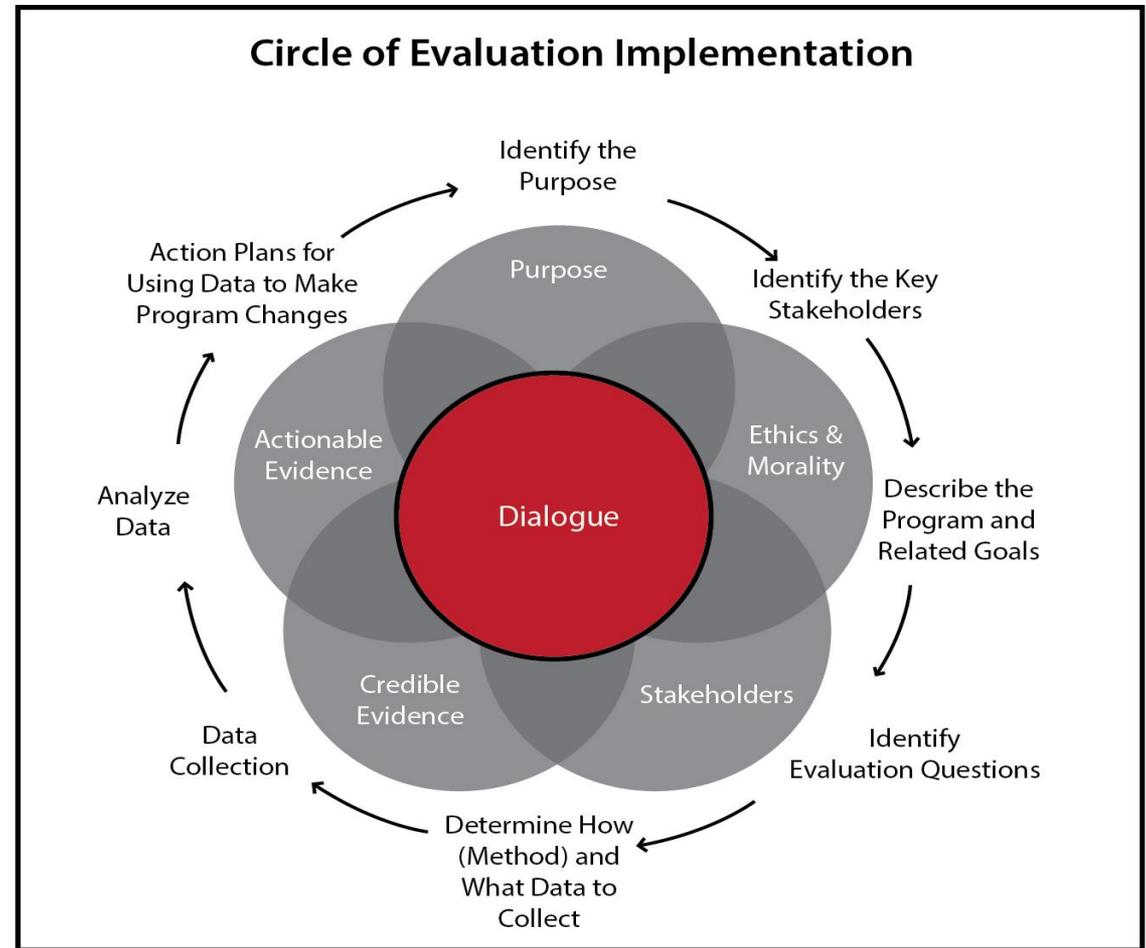
Feasible and Possible

What is the most useful for all stakeholders?

What is feasible?

- **Cost factors**

- **Time**

- **Partner engagement**

"One of the great mistakes is to judge policies and programs by their intentions rather than their results" -- Milton Friedman

What to do when disparity between utility and feasibility?

Matching design/data/needs

Feasible and Possible

Evaluation tools for planning and considering relevant factors

- **Measurement models**
- **Evaluation tables**
- **SMART objectives**
- **Utility**

Engagement of stakeholders can help ensure

- **Data availability/ accessibility**
- **Buy-in from key partners to support evaluation**

Evaluation Table

Evaluation Question	Indicator	Data Source(s)	Responsible Party	Analysis Plan	Timeframe	Dissemination Plan
What are you trying to find out?	Type of data	Where will you get the information you need	Who is responsible for getting it done?	What will you do with the data?	When will you collect the information	How will you share results and lessons learned?

CDC/CSTE Fellows: The Future of Applied Epidemiology Fellowship Measurement Model

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Short-term Outcomes

- Increased demand for fellowship opportunities
- Appropriate match between fellow and mentors
- Appropriate match between fellow and placement
- Demonstrated improvement on core competencies
- Improved skills and performance by fellow on assigned applied epi tasks
- Increased capacity/positive feedback from host site on work performed by fellow

Indicators

- # and quality of applicants (by qualifications and interest area)
- # of sponsoring agencies applying (by geography and interest area)
- Qualifications of mentors
- # of fellows placed with a host agency
- Employment record (post fellowship)
- Quality of work submitted (work plan, evaluation reports, etc)
- Evaluation reports from mentors and fellows
- Progress on competencies based on quarterly reports
- Publications and other work products generated over time by fellows

Long-Term Outcomes

- Fellows maintaining employment at state or local level
- Host sites reporting increased capacity due to fellows
- Ongoing mentor/fellow relationships

Impact

Increase in trained epidemiology staff at the state and local level across the nation

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Next Steps – Future discussions

Ensuring fit between design and questions

Ensuring all stakeholders are engaged

Selecting most relevant designs

Preparing the most useful reports

"Everything that can be counted does not necessarily count; everything that counts cannot necessarily be counted" -- Albert Einstein

Additional Resources

Discussion Board - http://cste.freeforums.net/

- **Relevant references and resources**

- **Discussion questions for group engagement between webinars**

- **Submission of 'assignments' for feedback/group discussion**

Selected References

Centers for Disease Control and Prevention. Introduction to Program Evaluation for Public Health Programs: A Self-Study Guide (2011). Available online at http://www.cdc.gov/eval/guide/CDCEvalmanual.pdf

Centers for Disease Control and Prevention. Evaluation Manual: Step 3 – Focus the Evaluation Design: Available online at: http://www.cdc.gov/getsmart/program-planner/Step3.html

Community Sustainability Engagment Evaluation Toolbox: Available online at: http://evaluationtoolbox.net.au/

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https://www.research.net/s/CDEval_Lesson1