“Measuring for Effectiveness When Nobody is Looking”

Barbara Morrison-Rodriguez, PhD
BMR Consulting, LLC
Lutz, Florida

Sapphire Awards and Symposium
Blue Cross Blue Shield of Florida Foundation
The Peabody Orlando
February 21, 2013
What is Evaluation?

- Helps you clarify your values
- Helps you know if your activities are reaching their intended groups
- Helps you to align your activities and desired outcomes and make efficient use of your program resources
- Helps ensure that you have selected the right “success measures” to provide evidence that your outcomes have been achieved
The Potential of Evaluation

- Acknowledgement that you are more likely to achieve your goals if they are well defined and measured
- Evaluation provides you with tools for obtaining and maintaining funding and support (evidence of effectiveness)
- Documents your efforts and allows you to inform yourself and others about what did and did not work
- Lets you know if your program works and how well
Two Basic Types of Evaluation

Process Evaluation
- Examines what goes on inside the program while it is in progress, focusing on such things as activities offered, staff practices, and client actions
- Evaluating program processes may be very helpful in understanding why program objectives are or are not met

Outcome Evaluation
- Also known as impact or program evaluation
- What happens to clients as a result of their participation in the program
EE Puzzle Pieces

- Mission
- Vision
- Target Population
- Service Population
- Goals
- Objectives
- Activities
- Outcomes
- Indicators
Program Design / Evaluation Elements

**Mission**
- The purpose or reason that the program or its host agency exists

**Vision**
- A desired state that would exist in the target population or its society in the absence of needs and problems being addressed by your program

**Target Population**
- An identified population or group the program intends to targets due to need, risk, age, geography or some other characteristic(s) that makes it a priority for services or intervention to be provided

**Service Population**
- Subset of the target population that your program actually serves
Program Design / Evaluation Elements

Goals

- The specific aims of a particular program, consistent with the mission and representative of how it contributes to the attainment of the vision
- Expresses the difference/improvement that will be made either in the lives of your clients or the operations of your organization

Objectives (Process)

- The steps needed to be accomplished in order to create or facilitate change / accomplish the goal – the strategic approach
- “Big buckets of work” or “big ticket items” you need to do or provide
- Are they *evidenced-based*?

Activities

- The individual, daily action items performed by program staff to accomplish your broader objectives
What Does “Evidenced-Based” Mean?

- The efficacy of an intervention is scientifically validated through robust research.
- Reliability and validity of results are demonstrated.
- Fidelity to the intervention is demonstrated.
- Research analysis is appropriate (peer review).
- Published results especially in peer-reviewed journals.
- Availability of implementation materials (manuals), training, quality assurance guidance, and evaluation tools and procedures.
Where to Find Evidenced-based Models

- Many are on websites, especially of Federal agencies in your field of interest
- “Google” “evidenced-based interventions for . . . and specific a target population or specific type of service program
- Search the research literature (peer-reviewed journal articles and books in your field of interest)
- Consult with experts in the field
Program Design / Evaluation Elements

**Outcomes**
- The desired changes in your clients, their situation or your organization’s operations that the program intends to achieve as a consequence of accomplishing the stated process objectives
  - Outcomes are stated for objective
  - Outcomes are reasonable – appropriate developmental stage for program
  - Increase, decrease, improve, etc. compared to baseline data if available

**Indicators**
- Specific “success measures” and/or benchmarks are used as evidence that outcomes have actually been achieved
Selecting the Best Indicators for Evidence

- Proxy Power-High Validity
- Communication Power: Understandable
- Data Power: Data available or easily and affordably collected
- Look for commonly used indicator measures in the research and service program literature
Finding Validated Outcome Measures

- Published research in professional journals
- Published program evaluations
- Online searches such as “Google Scholar”
- Federal agencies that sponsor research (check their websites as well): CDC, NIH, NCI, etc.
- Books on validated research measures in your field
    - Ian McDowell (2006)
- Consult with scholars (university faculty) in your field
Behavior Change Model as a Guide for Alignment of Outcomes and Success Measures

- Knowledge
- Attitudes
- Skills
- Behaviors
- Environment

Which domain are you working in?

Are your success measures appropriate for the domain you are working in?
Logic Model: “Matrix”

- To convey in concise measurable language what you hope to accomplish (outcomes), how (process objectives), and how you will provide evidence of success achievement of outcomes (tools/indicators)

- The logic model (“matrix”) should be developed as if it is a “stand alone” document

- It provides a “snapshot” of the overall approach to the project and the evidence you will produce to demonstrate its outcomes.
**Sample Logic Model Format**

**GOAL: Client/Org-Focused. Simple. Specific. “So what?”**

<table>
<thead>
<tr>
<th>PROCESS OBJECTIVES</th>
<th>ACTIVITIES</th>
<th>TIME FRAME</th>
<th>REQUIRED RESOURCES</th>
<th>RESPONSIBLE PERSONS</th>
<th>OUTCOMES</th>
<th>INDICATORS AND TOOLS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major strategic approaches used to accomplish desired outcomes and the anticipated results</td>
<td>The individual tasks/steps performed by the staff to achieve each objective</td>
<td>Due dates for activities</td>
<td>(Helps to prepare and justify budget)</td>
<td>(Positions rather than names)</td>
<td>Projected benefits / degree of change often expressed as percentages and compared to baseline if available</td>
<td>Measures and processes used to demonstrate outcome attainment</td>
</tr>
<tr>
<td>(What)</td>
<td>(How)</td>
<td>(When)</td>
<td>(Who)</td>
<td>(Why)</td>
<td>(Evidence)</td>
<td></td>
</tr>
<tr>
<td>Process Objective 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Objective 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Objective 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Increase or decrease by X% resulting in Y more or less desired effect compared to a baseline of Z
Using Evaluation Data

- **PLAN**: Logic model matrix is the evaluation plan
- **DO**: Implement the program activities as planned (*process evaluation*)
- **CHECK**: Monitor progress routinely on proposed process and outcome measures (*outcome evaluation*)
- **ACT**: Undertake corrective actions based on data
Analyze Factors Affecting Performance and Outcomes

- Quality of performance of program activities (Taking Stock Handout)
- Other internal factors (Factor Analysis Handout)
- External factors
- Restricting factors
- Contributing factors
- Creating a corrective action plan as needed (Corrective Action Plan Handout)
Taking Corrective Action

- What does the evaluation data tell you about what needs to change? Involve staff and stakeholders in analysis and discussion of the data.

- Make a change plan with specific action steps, responsible parties and time-frames for re-assessment

- Share “lessons learned” as a way of contributing to the knowledge base in your field of practice
Dr. Barbara Morrison-Rodriguez
BMR Consulting, LLC
(813) 312-3352
drbmr47@hotmail.com
www.bmrconsult.com

"Strategic Thinking for Effective Action"