

Evaluation Challenges from the Field Game: Answer Key

They Say/We Say



at the Centre for Health Promotion
University of Toronto

PRINT ON FRONT OF CARD	THEY SAY: PRINT ON FRONT OF CARD	WE SAY: PRINT ON BACK OF CARD	Answer # for reference
<p>Step One: Clarify Your Program</p> <p>Substep: Define your program goals, population of interest, and outcome objectives</p>	<p>We have been operating for years without objectives. Writing some now seems backwards.</p>	<p>-May reveal logic gaps that you can help you adjust program delivery.</p> <p>-Just writing them may clarify program areas that need improvement, without even doing more evaluation.</p>	1.
	<p>We serve the general population, so can not define our audience more clearly than that.</p>	<p>-You do yourself a disservice by almost guaranteeing that you are missing the mark on some or many people who receive the product/service.</p> <p>-Better to choose a focus for development, even if dissemination is ultimately broader so that you are sure you are impacting on some.</p>	2.
	<p>The mandatory programs just say we have to get this information out to people. They do not say anything about outcomes, so why bother using our resources for outcome evaluation?</p>	<p>-Other funders who might give you money will care.</p> <p>-Internally, evaluation will help you to see how much effort you should be putting in because with all MPGs there is room for interpretation and degree of effort</p> <p>-In the near future, they may start to require evaluation, thus you will be ahead of the game.</p>	3.
<p>Step One: Clarify Your Program</p> <p>Substep: Define your program activities & outputs</p>	<p>Under construction</p>	<p>Under construction</p>	4.

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<p>Step One: Clarify Your Program</p> <p>Substep: Establish measurable program indicators</p>	<p>Our program is part of a bigger initiative. We do not expect it to impact our audience on its own. So why evaluate if effects will not be detected?</p>	<p>-Certain types of evaluation (formative, process) will help you see how likely it is that you are (or are not) contributing to the larger effects (or lack of).</p>	5.
	<p>We can worry about indicators later if we ever get evaluation funding.</p>	<p>-Having indicators will help you get funding.</p> <p>-Having a clear view of what you want to specifically affect, will help you shape the program and increase likelihood of success, even if you don't actually measure or track those indicators right away.</p>	6.
	<p>We routinely do a satisfaction survey at the end of the program. Results are always positive. We do not need other indicators.</p>	<p>-Satisfaction is rarely directly correlated with impact/real change in the population</p>	7.
	<p>We already have good tracking processes in place to determine how many people we have served. We do not need other indicators.</p>	<p>-Reach is very important, but will tell you nothing about what the impact is in the population once you get the message/product/program out to them.</p>	8.
<p>Step One: Clarify Your Program</p> <p>Substep: Ensure the organization supports the evaluation process</p>	<p>Our health unit says that our epidemiologist must review all evaluation activities. We will never get her time this year.</p>	<p>-There are many things you can do to set yourself up for a good evaluation when the time is right (objectives, indicators, etc.).</p> <p>-They can be done under the heading of 'planning'.</p> <p>-They will help you get on the radar sooner</p> <p>-could try making a case for using THCU or other resource center review services to support if resident expert is not available</p>	9.

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<p>Step One: Clarify Your Program</p> <p>Substep: Ensure the organization supports the evaluation process</p>	<p>Each year our organization selects a few priority programs to evaluate. We did not get chosen this year.</p>	<p>-There are many things you can do to set yourself up for a good evaluation when the time is right (objectives, indicators, etc.).</p> <p>-They can be done under the heading of 'planning'.</p> <p>-They will help you get on the radar sooner</p> <p>-Could try making a case for using THCU or other resource center review services to support if resident expert is not available</p>	<p>Answer is repeat of answer 9</p>
<p>Step Two: Engage Stakeholders</p> <p>Substep: Understand stakeholder interests and expectations</p>	<p>If the results are negative, our funder may not give us money again.</p>	<p>-Position the evaluation as a CQI (continuous quality improvement) process</p> <p>-A formative evaluation will not show negative impact, in fact will set you up for success – hard to argue with that!</p>	<p>10.</p>
	<p>Our funder does not expect us to do an evaluation.</p>	<p>-Other funders who might give you money will care.</p> <p>-Internally, evaluation will help you to see how much effort you should be putting in because with all MPGs there is room for interpretation and degree of effort</p> <p>-In the near future, they may start to require evaluation, thus you will be ahead of the game.</p>	<p>Answer is repeat of answer 3</p>
	<p>Our program participants do not care what the evaluation results say.</p>	<p>-Asking will still help you to figure out impact on the population</p> <p>-Potential participants from the intended audience who haven't already enrolled/received, etc. may care – you may find that you are only getting a biased sample of participants.</p>	<p>11.</p>

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<p>Step Two: Engage Stakeholders</p> <p>Substep: Understand stakeholder interests and expectations</p>	<p>Our funder asked us to do an impact evaluation, but we have allocated only \$5000.</p>	<p>-There are low cost impact evaluation options.</p> <p>-Funder may have a different understanding of the word 'impact' – would be good to clarify before you dismiss formative and process options.</p> <p>-This may be an opportunity to educate your funder about what an better impact evaluation would look like (in the final report).</p>	<p>12.</p>
<p>Step Two: Engage Stakeholders</p> <p>Substep: Engage stakeholders</p>	<p>We do not have time to talk to stakeholders.</p>	<p>-Don't always have to think about formal, expensive consultation options. When budget is limited, even casual checking in (informal conversation with 'man on the street' can provide useful input).</p>	<p>13.</p>
	<p>Most of the people interested in our program, do not know anything about evaluation, so they will not have anything useful to add to our evaluation plan.</p>	<p>-They don't have to know anything about evaluation, just about what they want to learn.</p>	<p>14.</p>
	<p>Our stakeholders do not have time to work on an evaluation.</p>	<p>-Involve stakeholders carefully in limited, meaningful ways to reduce burden and make them feel their time was worth it.</p>	<p>15.</p>

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<p>Step Two: Engage Stakeholders</p> <p>Substep: Develop evaluation questions (based on program goals and objectives and stakeholder interests/expectations)</p>	<p>Our program is already a recommended practice, so why should we evaluate?</p>	<p>-Though they may be recommended, programs are rarely ‘canned’. Thus they are generally tailored or totally redeveloped for a new setting or audience. The implementation setting can make all the difference in terms of success.</p> <p>-In this case, dollars might be better spent on formative and process.</p>	16.
	<p>We want to know whether health fairs/pamphlets/posters/magnets/the local cable station, etc. (one-offs, or single vehicles) are effective.</p>	<p>-Be careful about how you define ‘effective’ with such questions.</p> <p>-Context is everything – whether they are ‘effective’ will depend on what broader initiative they are a part of, the specific message being applied, the specific design/production/setting.</p> <p>-Whether they are effective also strongly depends on the audience – a universal statement can’t be made.</p>	17.
	<p>We did a satisfaction survey last year and ratings were high, so we do not have evaluation questions for this year.</p>	<p>-Satisfaction is rarely directly correlated with impact/real change in the population</p>	Answer is repeat of answer 7
	<p>We just want to know whether this program is our best use of resources.</p>	<p>-This is a complicated evaluation question that must involve both measurements of impact as well as comparison with alternatives</p> <p>-Formative and process stages are also essential to see if program is designed right and whether audience is being reached, in the right way</p> <p>-Not possible to make a broad statement about a ‘program’ – often the specific methods of design and implementation make all the difference (thus need for formative and process testing).</p>	18.

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<p>Step Two: Engage Stakeholders</p> <p>Substep: Develop evaluation questions (based on program goals and objectives and stakeholder interests/expectations)</p>	<p>We are mandated to do this program, so it does not matter what our evaluation questions are.</p>	<p>-Other funders who might give you money will care.</p> <p>-Internally, evaluation will help you to see how much effort you should be putting in because with all MPGs there is room for interpretation and degree of effort</p> <p>-In the near future, they may start to require evaluation, thus you will be ahead of the game.</p>	<p>Answer is repeat of answer 3</p>
<p>Step Three: Assess Resources For The Evaluation</p> <p>Substep: Determine availability of staff and resources</p>	<p>None of the people on our program team know anything about evaluation.</p>	<p>-Contact THCU</p> <p>-When you only have limited funds, contractors can be used in limited ways to just ‘set you up’ with good objectives and data gathering methods.</p>	<p>19.</p>
	<p>Our staff are tied up with implementation, we would need more resources to do an evaluation.</p>	<p>-Typically 10% of resources should be allocated to evaluation</p> <p>-Just doing a good job of step one (objectives, indicators, logical links) can be done under the heading of good planning and can set you up for when more resources become available</p> <p>-Doing step one and two well can also help get resources – funders will appreciate that the ground work had been done</p>	<p>20.</p>

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	<p>We have a launch deadline, so cannot do an evaluation now. Maybe we can evaluate it later.</p>	<p>-Typically 10% of resources should be allocated to evaluation</p> <p>-Just doing a good job of step one (objectives, indicators, logical links) can be done under the heading of good planning and can set you up for when more resources become available</p> <p>-Doing step one and two well can also help get resources – funders will appreciate that the ground work had been done</p>	<p>Answer is repeat of answer 20</p>
<p>Step Three: Assess Resources For The Evaluation</p> <p>Substep: Determine amount of money allocated for evaluation</p>	<p>When our work plan was approved, we did not allocate time or money to evaluation. We cannot reallocate now.</p>	<p>-Typically 10% of resources should be allocated to evaluation</p> <p>-Just doing a good job of step one (objectives, indicators, logical links) can be done under the heading of good planning and can set you up for when more resources become available</p> <p>-Doing step one and two well can also help get resources – funders will appreciate that the ground work had been done</p>	<p>Answer is repeat of answer 20</p>
	<p>We have limited money and feel that it is better spent on the program itself.</p>	<p>-Typically 10% of resources should be allocated to evaluation</p> <p>-Just doing a good job of step one (objectives, indicators, logical links) can be done under the heading of good planning and can set you up for when more resources become available</p> <p>-Doing step one and two well can also help get resources – funders will appreciate that the ground work had been done</p>	<p>Answer is repeat of answer 20</p>

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<p>Step Four: Design The Evaluation</p> <p>Substep: Select type of evaluation to be conducted – formative, process, summative</p>	<p>It is only a one-year grant – too short to do a summative evaluation.</p>	<p>-Formative/process may be more worthwhile to help secure more funding in the future for a repeat</p>	21.
	<p>Our funder only wants to know about the ultimate impact, so we should focus on summative.</p>	<p>-In some cases, formative/process may actually give you more information about possible impact – depending on resources available</p> <p>-Funder may not actually understand what they have asked for, they may be using the term differently, or not understand what resources are required.</p> <p>-Good to clarify funder understanding of impact before making expensive assumptions.</p>	22.
	<p>We have a launch deadline, so do not have time to do anything formative. We will evaluate the program after.</p>	<p>-The drawback is that doing it after often reveals design flaws that would have been more useful in the formative phase</p>	23.
	<p>We cannot afford a well-designed impact evaluation, and do not want to do a partial job of it.</p>	<p>-Formative/ process can also provide some very important information about plausible contribution of the program to real audience changes.</p>	24.
	<p>Health promotion is organic and ever changing, therefore it cannot be evaluated.</p>	<p>-There are challenges, especially with tracking large scale behavioural changes. However, there are realistic, concrete evaluation questions that can be answered about health promotion programs.</p> <p>-Often, because of the challenges measuring impact – especially in the short-term – formative and process evaluation are essential</p>	25.

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<p>Step Four: Design The Evaluation</p> <p>Substep: Consider ethical issues and confidentiality</p>	<p>Our program deals with children. The ethical issues around accessing children are complex. We do not have the resources to jump through all the necessary hoops.</p>	<p>-Consider whether it is essential that you talk to the children. They may be other proxy measures that will suffice</p> <p>-In some cases, the hoops may be worth it</p> <p>-Talk to ethical review people to look for loopholes that will expedite the approval process. For example, an existing group of children who operate with parents or supervisors present, may be easier to access if the topic is such that it is okay to have parents present</p>	26.
	<p>Ethical reviews take a long time. We need to begin our evaluation right away.</p>	<p>-Talk to ethical review people to look for ways to simplify the process. Certain types of data collection may have more ethical risks than others.</p>	27.
<p>Step Five: Determine Appropriate Methods Of Measurement And Procedures</p> <p>Substep: Choose qualitative versus quantitative methods</p>	<p>We want to survey our community to figure out whether we are meeting their needs.</p>	<p>-Proper surveys require careful and often costly and time-consuming design and testing. Getting a meaningful (ideally random) sample can also be costly and time-consuming.</p> <p>-Consider whether your evaluation questions really require the use of the survey.</p>	28.
	<p>We will do a focus group after the program to determine impact.</p>	<p>-Carefully consider whether a focus group will answer your evaluation questions. Focus groups are generally more useful for formative and process evaluation questions</p> <p>-Focus group results cannot be considered generalizable</p> <p>-Focus groups are often chosen as the default, low- resource options. However, they are not as cheap and convenient as is sometimes thought (to do them properly).</p>	29.

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	Our manager does not consider qualitative data valid.	<p>-It depends on the research questions. In some cases that may be a valid point.</p> <p>-A careful assessment of match between evaluation questions and methods is always warranted</p> <p>-Qualitative data provides different kind of information. Generally it is a good first step to help you clarify or negate your assumptions. It can be a good way to test quantitative tools or help you develop quantitative tools. It is especially good for exploring a new program, topic or audience that you do not have a lot of experience with.</p>	30.
<p>Step Five: Determine Appropriate Methods Of Measurement And Procedures</p> <p>Substep: Select your sampling design</p>	We want to do a survey, but do not have the money to contract out for a true random sample of our population – a convenience sample is all we can afford.	<p>-In this case, consider whether a survey is the only and best method to answer your evaluation questions.</p> <p>-Although a convenience sample saves time, good analysis of a quantitative data is still labour intensive.</p> <p>-Other methods may be less resource intensive overall and still help answer evaluation questions.</p>	31.
	To save resources, our lead program developer is going to facilitate the focus groups.	<p>-An unbiased facilitator is essential for collecting good focus group data.</p> <p>-Although good, standardized questions for the facilitator to follow can help eliminate bias, the nature of focus groups involves the use of many unplanned prompts to probe for more detailed information. It is very difficult to keep personal biases out of this process.</p> <p>-If a program team member must facilitate, be sure to have standardized questions and try to anticipate as many prompts as possible and be aware of intonation and body language that may reveal biases.</p>	32.

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	A staff person from another program is interested in the topic area. She has volunteered to take notes.	<p>-Focus group recording is a difficult job. It is best to capture as many of the specific words used by the participants as possible.</p> <p>-In paraphrasing, there is a high risk of introducing biases in interpretation.</p> <p>-The gold standard for focus group records is word for word transcription from a tape- recording. This allow for the most accurate content coding following the session.</p>	33.
Step Six: Develop Work Plan, Budget And Timeline For Evaluation	Under construction	Under construction	34.
Step Seven: Collect The Data Using Agreed-upon Methods And Procedures Substep: Pilot test	Our resources are limited and we cannot use them for pilot testing.	<p>-With limited evaluation resources, you would be better off to put all in formative and process basket, than do a half-job of summative (if you have any evaluation resources)</p> <p>-Pilot testing tool to make sure it's valid may be more important than getting a bigger sample size – you may have to reconsider your priorities. A lot of bad data doesn't do anyone any good.</p> <p>-Consider a review by expert (e.g. THCU, epidemiologist) for feedback on the tool, if no allowance for pre-testing can possibly be made.</p> <p>-Think less formal testing methods (e.g., a few conversations) to reduce burden and catch the main problems.</p>	35.

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	We pilot tested the tool and had to rework most of it, but we do not have time to test it again even though it is completely different.	<p>-Wise to allow for two substantial reworking phases in such circumstances.</p> <p>-In this case, not doing testing again may be almost as bad as not doing it at all.</p> <p>-Think less formal testing methods (a few conversations) to reduce burden and catch main problems. It is better than nothing.</p>	36.
<p>Step Seven: Collect The Data Using Agreed-upon Methods And Procedures</p> <p>Substep: Data collection</p>	We have a number of volunteers willing to do data collection.	<p>-Set up contracts with volunteers as if employed and use similar screening methods to make sure they are qualified.</p> <p>-Standardized methods and good training are always important – even more so with volunteers.</p> <p>-If an employer/employee-like relationship isn't appropriate or manageable because of personalities and/or history of the relationship, you may want to consider whether this 'free' service is worth risking a contaminated or lower quality data set.</p>	37.
<p>Step Eight: Process and Analyze the Data</p> <p>Substep: Prepare the data for analysis</p>	Under construction	Under construction	38.
<p>Step Eight: Process and Analyze the Data</p>	We scanned the focus group transcripts and have a sense of where to go from here.	<p>-Too easy to add your own biased interpretation without proper methodology.</p> <p>-Spend the time coding and counting the main themes.</p>	39.

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<p>Substep: Analyze the data</p>	<p>We do not have the resources to analyze the results for all the questions we asked</p>	<p>-Can be avoided by spending time with analysis plan and even final report layout prior to finalizing the questionnaire.</p> <p>-When there isn't time for that (there rarely is) can be partially avoided by properly linking evaluation questions with tool questions and eliminating 'nice to knows'.</p> <p>-Analysis time is often vastly underestimated.</p> <p>-It is disrespectful to participants to not use all of the data that they give, as their time is precious. It is best to eliminate 'nice to knows' in advance.</p>	<p>40.</p>
<p>Step Nine: Interpret and Disseminate the Results</p>	<p>The number of people who requested our materials was extremely high, so we know we were effective.</p>	<p>-Reach is very important, but will tell you nothing about what the impact is in the population once you get the message/product/program out to them.</p>	<p>Answer is repeat of answer 8</p>
<p>Substep: Interpret results</p>	<p>Different groups have different opinions of our program; therefore we do not know if it is effective.</p>	<p>- Identifying a priority target audience that is as homogenous as possible can help avoid this problem – as impact on the intended population is all that matters</p> <p>-Setting clear, measurable indicators also can help avoid this problem as there won't be debate (or not as much) – facts will be facts. The debate will occur during the setting of indicators, but will be limited later.</p> <p>-Not skipping other planning steps can also help avoid this (e.g. clear objectives about what program is trying to accomplish).</p>	<p>41.</p>

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<p>Step Nine: Interpret and Disseminate the Results</p> <p>Substep: Present results</p>	<p>The report is just going to sit on a shelf anyway, so why do it?</p>	<p>-Engaging stakeholders in step two will help avoid this because you will be working to specifically answer what they need to know, without extraneous information</p> <p>-Careful report design, tailored for the target audiences, with clear recommendations for action can also avoid this problem.</p> <p>-Multiple executive summaries, tailored to the reader, can also avoid this scenario.</p>	<p>42.</p>
<p>Step Nine: Interpret and Disseminate the Results</p> <p>Substep: Share results</p>	<p>No one will be interested in a long report like this.</p>	<p>-Engaging stakeholders in step two will help avoid this because you will be working to specifically answer what they need to know, without extraneous information</p> <p>-Careful report design, tailored for the target audiences, with clear recommendations for action can also avoid this problem.</p> <p>-Multiple executive summaries, tailored to the reader, can also avoid this scenario.</p>	<p>Answer is repeat of answer 42</p>

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<p>Step Ten: Take Action</p>	<p>We are not going to do this program again, so why bother?</p>	<ul style="list-style-type: none"> -Funder may still expect some kind of evaluation -Other stakeholders may want to know how it worked and not doing one may result in loss of your credibility related to future programs -In the future, someone may consider doing something similar again. Having information about whether that is a good idea could ultimately save resources. -Reason for not doing it again is key. If you already feel it is ineffective or too costly to justify the benefits, that is one thing. If funding has been cut, but you would rather continue, that is different. Good evaluation can help you secure other funding sources. 	<p>43.</p>
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