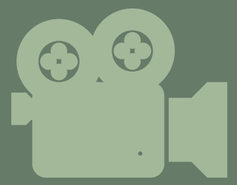
# BUDDIES PROJECT SESSION 7

## Types of Evaluation

Thursday, February 15, 2024

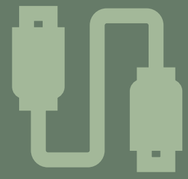
# *A bit of* HOUSEKEEPING



Recording the didactic presentations and BUDDIES updates

Closed captioning available, if needed

Please keep cameras on, if possible

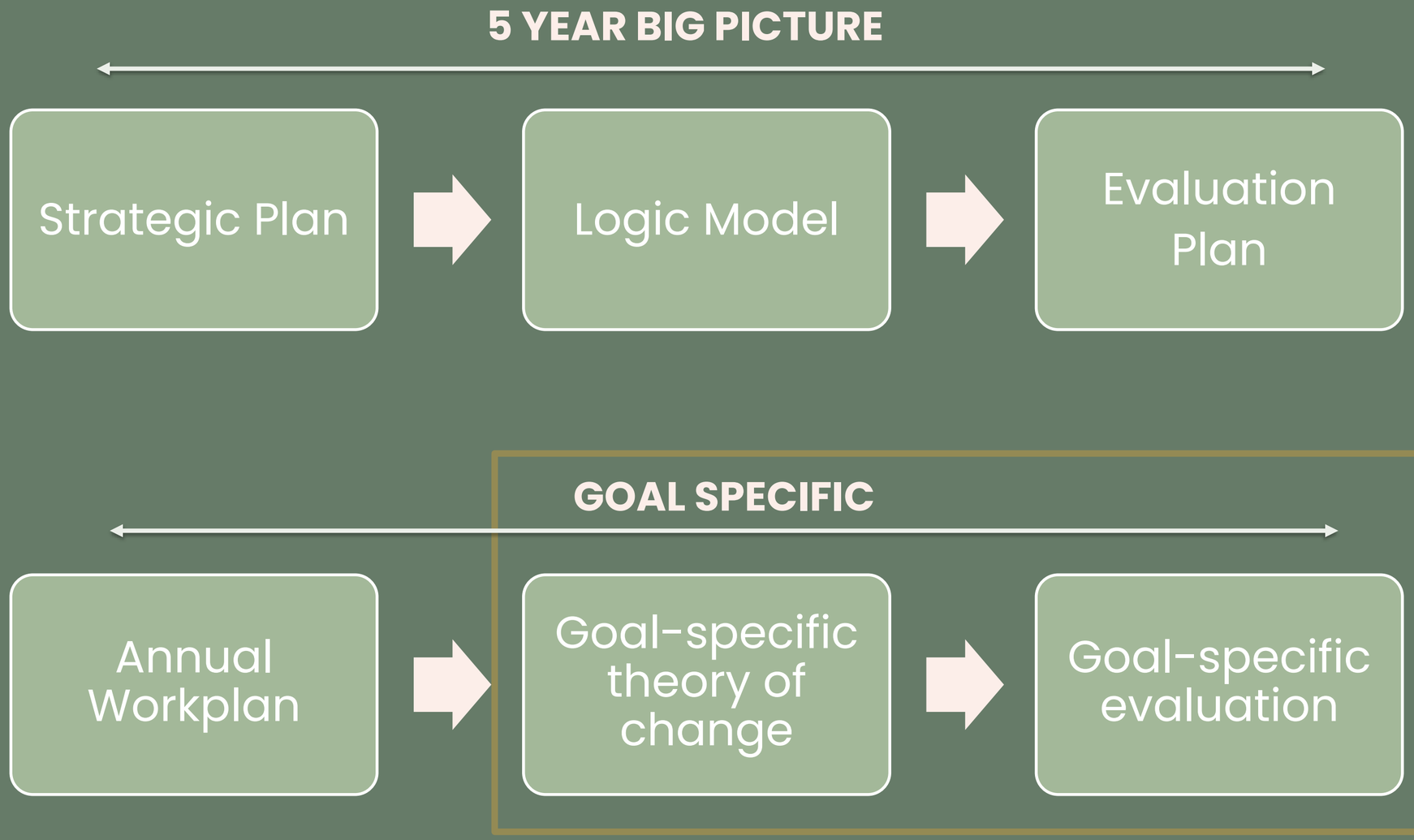


IT / Tech issues?
Let Chad know in chat or phone:
(207) 992-7325

today's
# AGENDA

1. Presentation on Goal-Specific Theory of Change
2. Small Group Activity
3. Presentation on Types of Evaluations
4. BUDDIES Updates
5. Wrap Up & Next Steps

# GOAL-SPECIFIC THEORY OF CHANGE


5 YEAR BIG PICTURE
Strategic Plan
Logic Model
Evaluation Plan
GOAL SPECIFIC
Annual Workplan
Goal-specific theory of change
Goal-specific evaluation

# THEORY OF CHANGE

## What?

Road map

Chain of causation

Causal chain

*Project hypothesis*

Conceptual map

*Framework for action*

*Theoretical rationale*

Theoretical underpinning

*Project theory*

*Project framework*

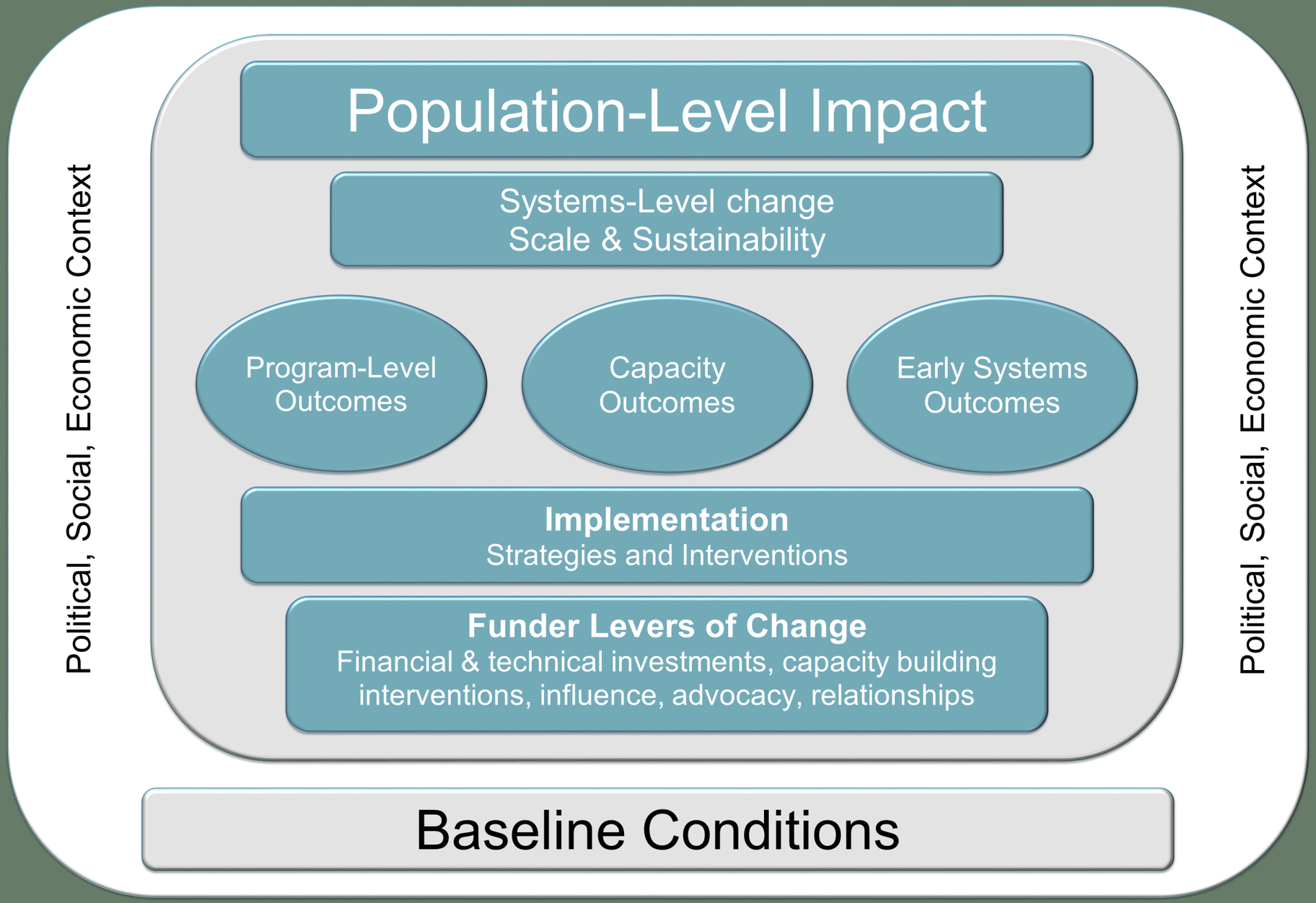
Blueprint for change

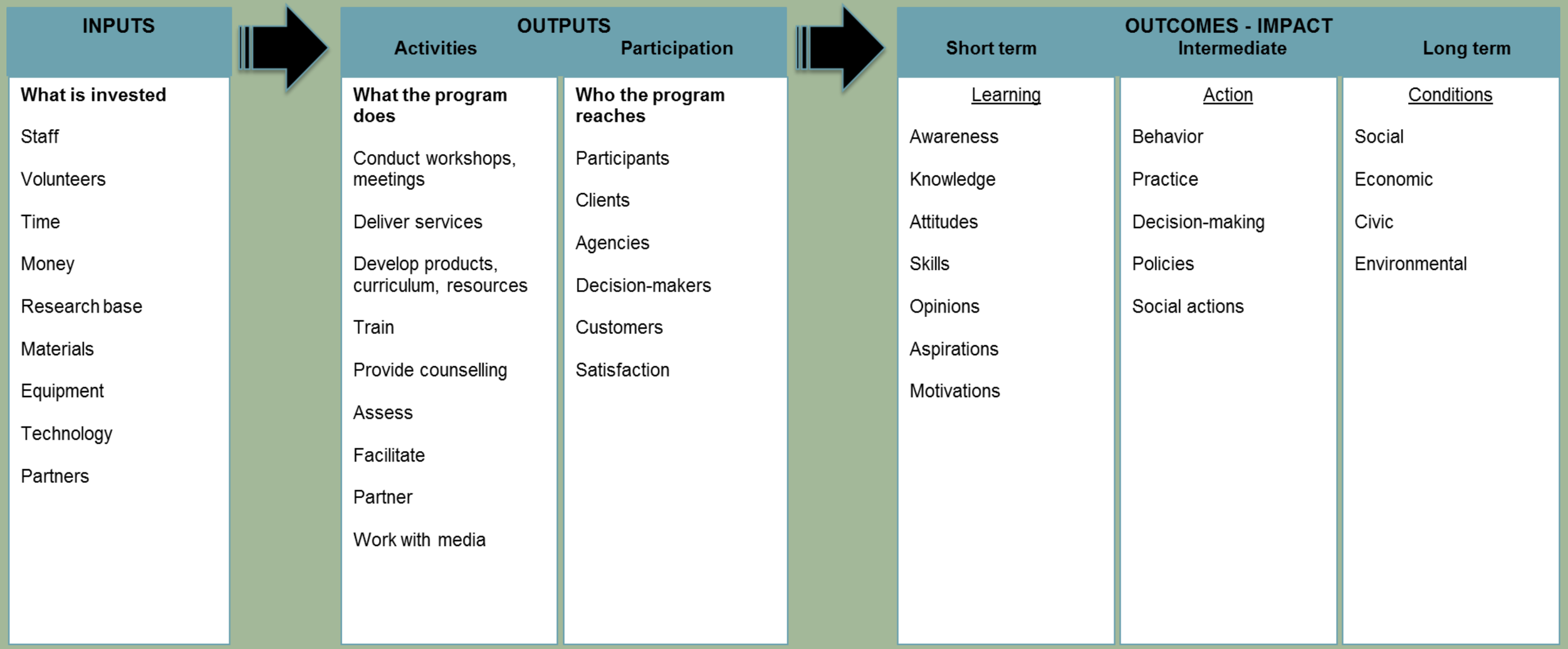
Pathways map

Theory of change

*Mental model*

A systematic and visual way to present the perceived relationships among the resources you have to operate the project, the activities you plan to do, and the changes (results) you hope to achieve.


Political, Social, Economic Context
Population-Level Impact
Systems-Level change
Scale & Sustainability
Program-Level Outcomes
Capacity Outcomes
Early Systems Outcomes
Implementation
Strategies and Interventions
Funder Levers of Change
Financial & technical investments, capacity building interventions, influence, advocacy, relationships
Baseline Conditions
Political, Social, Economic Context


INPUTS
OUTPUTS
Activities
Participation
OUTCOMES - IMPACT
Short term
Intermediate
Long term
What is invested
Staff
Volunteers
Time
Money
Research base
Materials
Equipment
Technology
Partners
What the program does
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Deliver services
Develop products, curriculum, resources
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Customers
Satisfaction
Learning
Awareness
Knowledge
Attitudes
Skills
Opinions
Aspirations
Motivations
Action
Behavior
Practice
Decision-making
Policies
Social actions
Conditions
Social
Economic
Civic
Environmental

## IMPLEMENTATION

## PLANNING

### WHO IS INVOLVED?

Membership comprised of individuals and groups that can effect change in individuals, professional groups, systems, or policies.

Measured through:

- Membership composition
- Level of involvement
- Recruitment

### HOW DO THEY INTERACT?

Partnership structure and procedures are in place to facilitate collaboration, action, and improvement.

Measured through:

- Demonstrated commitment to self-assessment
- Defined roles and responsibilities
- Partnership structure
- Group dynamics
- Maintenance of interest in collaborating / contributing
- Leadership
- Shared vision
- Perceived benefits / drawbacks

### WHAT DO THEY DO?

- Coordinate and integrate activities
- Contribute resources
- Prioritize activities
- Maintain partnerships and build collaborations
- Communicate key messages to audiences and stakeholders
- Increase knowledge and build skills
- Identify potential funding / resources
- Implement interventions

### WHAT ARE THE RESULTS?

Partnerships and relationships are institutionalized and sustained and / or there is an improved climate for change.

Measured through:

- Public policy changes or policy / procedural changes within partner organizations
- New or strengthened external relationships / networks
- Synergy / coordination / increased credibility and access to key populations
- Identified or garnered resources for future

### DISTAL OUTCOMES

Measured through intervention indicators and surveillance

# ANNUAL WORKPLAN

link

## ANNUAL WORKPLAN

**Goal 1:**

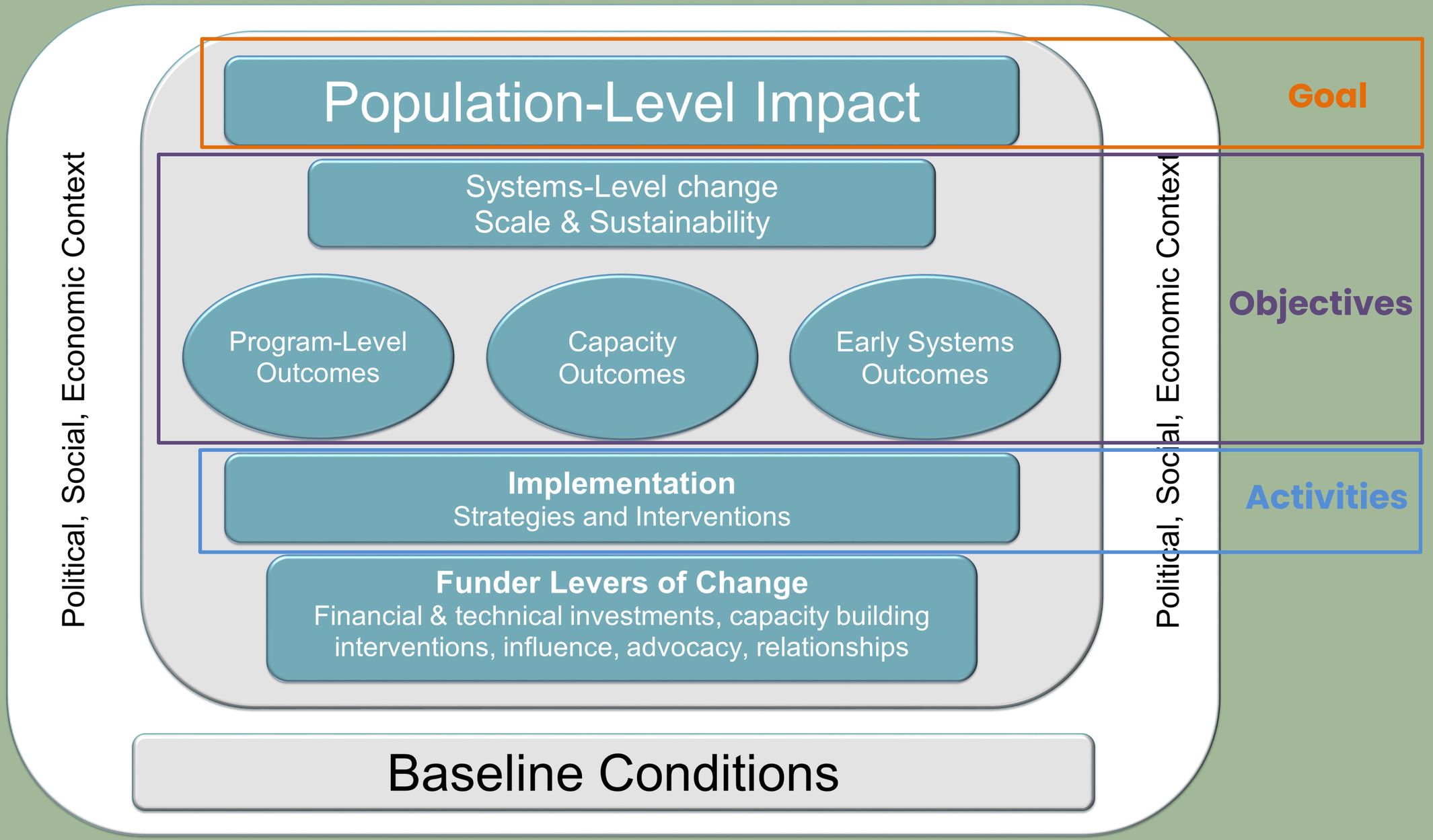
Objectives:

Performance Measures:

Key Activities:

Expected Outputs:

Expected Outcomes: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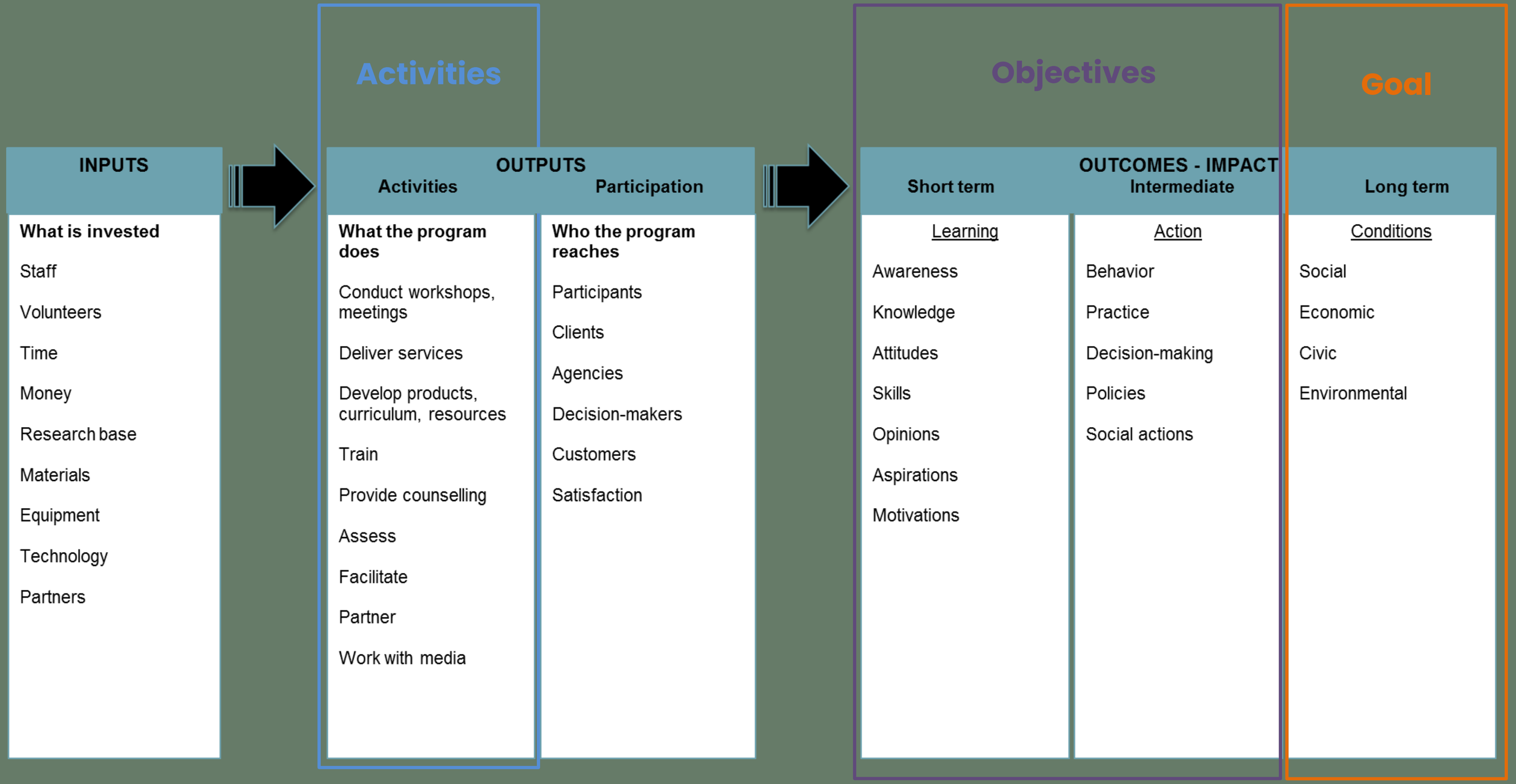
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Policies
Social actions
Conditions
Social
Economic
Civic
Environmental

*questions?*

**COMMENTS?**

*clarifications?*

# SMALL GROUP ACTIVITY

# REPORT OUT

# TYPES OF EVALUATION

*types of*

# EVALUATION

FORMATIVE EVALUATION

PROCESS EVALUATION

OUTCOME EVALUATION

# FORMATIVE EVALUATION

## WHAT?

- Evaluation that ensures a project is feasible and appropriate before being fully implemented
- Exploratory – can help highlight needs and/or context to inform project activities (e.g., needs assessment)

## WHY?

- Provides information to shape and refine the project
- Can help determine workplan activities and programmatic targets

## WHEN?

- During project development and/or modification
- Before finalizing project details and activities
- Continuously throughout the project

## SO WHAT?

- Maximize project success and desired outcomes
- Improve project design and/or delivery
- Save time, resources, & funds by identifying issues before they arise

# PROCESS EVALUATION

## WHAT?

- Evaluation that determines whether a project is being implemented as intended
- Could be focused on internal processes (e.g., partnerships/collaboration) or assessing systems of implementation (e.g., training approach, delivery system)

## WHY?

- Review the implementation of the project to ensure on track to meet desired outcomes
- Can help monitor progress the project is making towards achieving workplan targets

## WHEN?

- Once the project has been set and implementation has begun
- Continuously throughout implementation

## SO WHAT?

- Strengthen ability to report on project by ensuring activities are linking back to theory of change and intended outcomes/targets
- Identify unforeseen implementation challenges that can be addressed early in the project

# OUTCOME EVALUATION

## WHAT?

- Evaluation that measures progress towards intended outcomes (short-term and intermediate)
- With long-term projects (5+ years), can begin to assess impacts among the population of focus

## WHY?

- Assess the project's effects among the population of focus
- Can help determine if the project has reached the intended workplan targets

## WHEN?

- Once a project has been implemented
- Once the project has reached individuals from the population of focus

## SO WHAT?

- Show the overall effectiveness of the project
- Provide evidence of positive project outcomes to inform future work

*questions?*

**COMMENTS?**

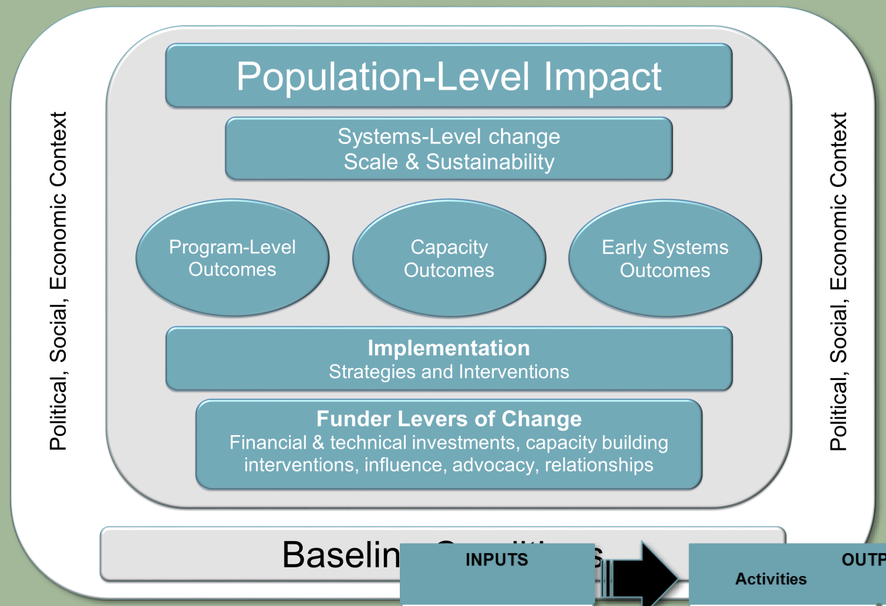
*clarifications?*

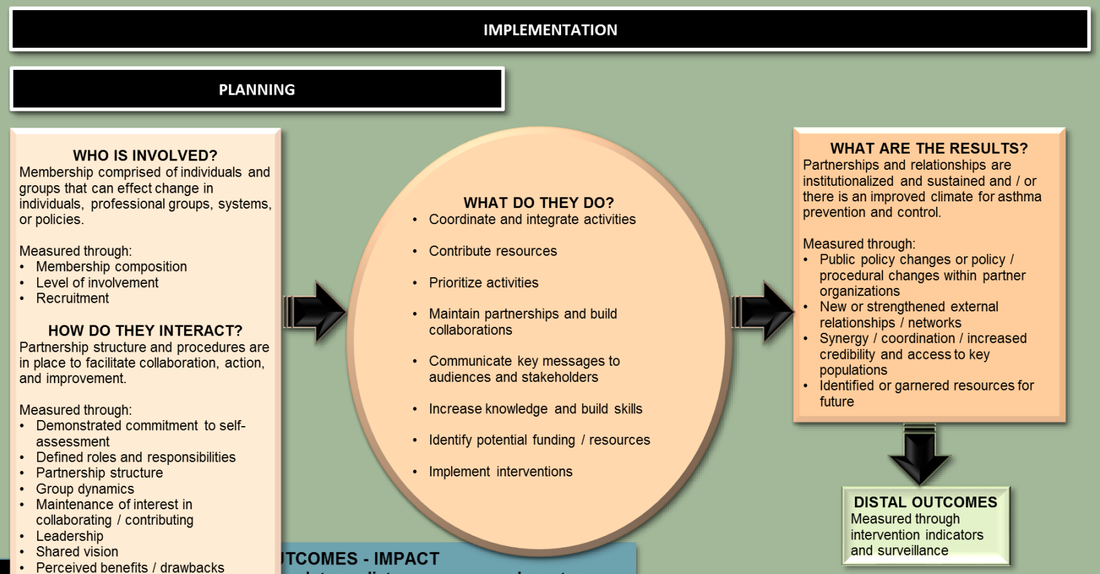
2024

# BUDDIES SESSION TOPICS

| SESSION | DATE | TOPIC |
|---|---|---|
| 8 | April 18 | Study Designs |
| 9 | July 22 (in-person) | Evaluation in the Project Management Cycle |
| 10 | September 19 | Traditional Data Collection Methods & Tools |
| 11 | November 21 | Innovative Data Collection Methods & Tools |

# THEORY OF CHANGE TEMPLATES




| INPUTS | OUTPUTS | | OUTCOMES - IMPACT | | |
|---|---|---|---|---|---|
| | Activities | Participation | | Intermediate | Long term |
| **What is invested** | **What the program does** | **Who the program reaches** | Learning | Action | Conditions |
| Staff | Conduct workshops, meetings | Participants | Awareness | Behavior | Social |
| Volunteers | Deliver services | Clients | Knowledge | Practice | Economic |
| Time | Develop products, curriculum, resources | Agencies | Attitudes | Decision-making | Civic |
| Money | Train | Decision-makers | Skills | Policies | Environmental |
| Research base | Provide counselling | Customers | Opinions | Social actions | |
| Materials | Assess | Satisfaction | Aspirations | | |
| Equipment | Facilitate | | Motivations | | |
| Technology | Partner | | | | |
| Partners | Work with media | | | | |

# EVALUATION RESOURCES

## Types of Evaluati

Once you've determined which program activities in your logic model should be evaluated, you can begin to identi types of evaluation you can conduct.

### What are the most common types of evaluation?

There are several types of evaluations that can be conducted. Some of them include the following:

- **Formative evaluation** ensures that a program or program activity is feasible, appropriate, and acceptable befor fully implemented. It is usually conducted when a new program or activity is being developed or when an exist is being adapted or modified.
- **Process/implementation evaluation** determines whether program activities have been implemented as intend
- **Outcome/effectiveness evaluation** measures program effects in the target population by assessing the progress outcomes or outcome objectives that the program is to achieve.
- **Impact evaluation** assesses program effectiveness in achieving its ultimate goals.

**Process Evaluation** determines whether program activities have been implemented as intended and resulted in outputs. You may conduct process evaluation periodically throughout the life of your program and start by reviewi activities and output components of the logic model (i.e., the left side).

Results of a process evaluation will strengthen your ability to report on your program and use information to imp future activities. It allows you to track program information related to Who, What, When and Where questions:

- To whom did you direct program efforts?
- What has your program done?
- When did your program activities take place?
- Where did your program activities take place?
- What are the barriers/facilitators to implementati of program activities?

**Outcome Evaluation** measures program effects in the target population by assessing the progress in the outcom the program is to address. To design an outcome evaluation, begin with a review of the outcome components of yo model (i.e., the right side).

Some questions you may address with an outcome evaluation include:

- Were medical providers who received intensive STD training more likely to effectively counsel, screen and tre patients than those who did not?
- Did the implementation of STD counseling in community-based organizations result in changes in knowled attitudes, and skills among the members of the target population?
- Did the program have any unintended (beneficial or adverse) effects on the target population(s)?
- Do the benefits of the STD activity justify a continued allocation of resources?

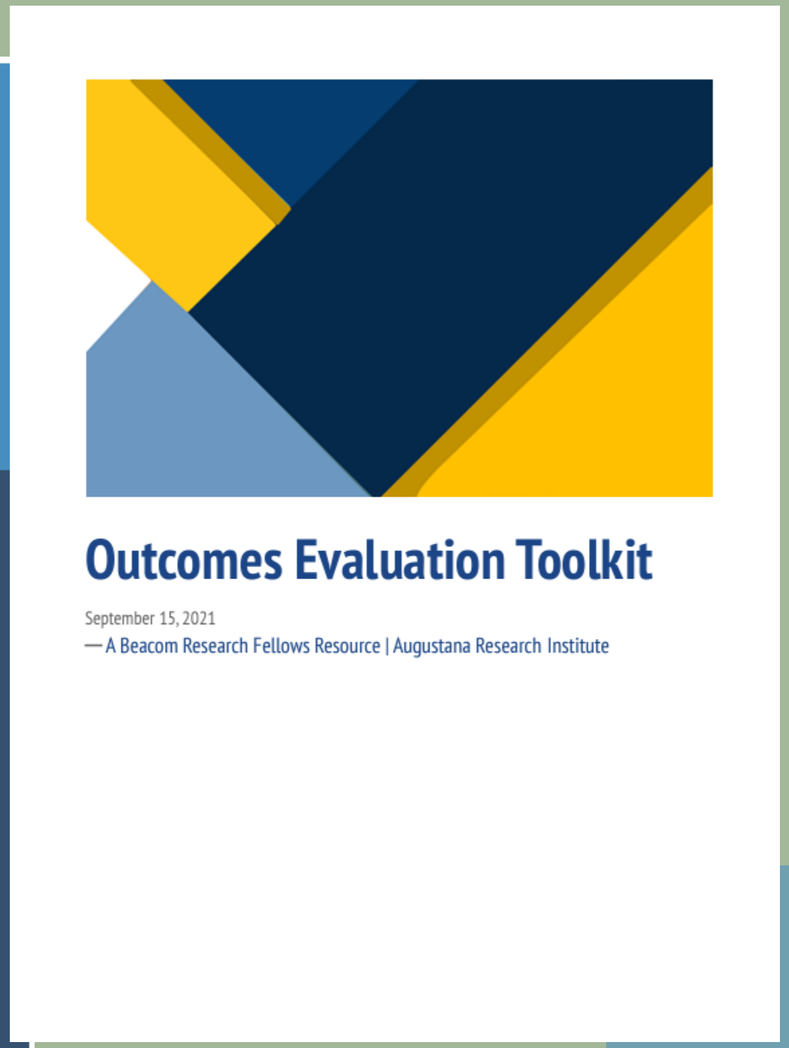
For more information and examples, see Step 3.1 in the Practical Use of Program Evaluation among STD Programs manual.
http://www.cdc.gov/std/program/pupestd.htm

National Center for HIV/AIDS, Viral Hepatitis, STD, and TB Prevention
Division of STD Prevention

TOOLKIT | December 2018

## Formative Evaluation Toolkit

A Step-by-Step Guide and Resources for Evaluating Program Implementation and Early Outcomes



## Outcomes Evaluation Toolkit

September 15, 2021

— A Beacom Research Fellows Resource | Augustana Research Institute

# WRAP UP

**NEXT SESSION**

Thursday, April 18, 2024
3:00 – 4:30 PM EST

**TOPIC**

Study Designs

**POST-SESSION SURVEY**

Please take 5 minutes to provide feedback on today’s session!

*keep the*

# CONVERSATION GOING

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## Michelle Munsey

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## Chad Mitchell

Chad.Mitchell@PartnershipsForHealth.org