"My question is: Are we making an impact?"

S.GROSS

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Plan for Today

1. Walk through 4 non-technical steps for getting started on measuring the progress and outcomes of your program / intervention

2. Peer breakout group discussion: involving participants / clients & stakeholders in measurement

3. Reconvene for sharing advice and questions

↳ Everyone leaves with ideas, resources, and potential connections to help make measurement a routine part of your initiative!

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What we're *not* going to cover:

- Specific software tools & resources

- How to select a data vendor / upgrade your data system

- Data governance

- Choosing analytic methods

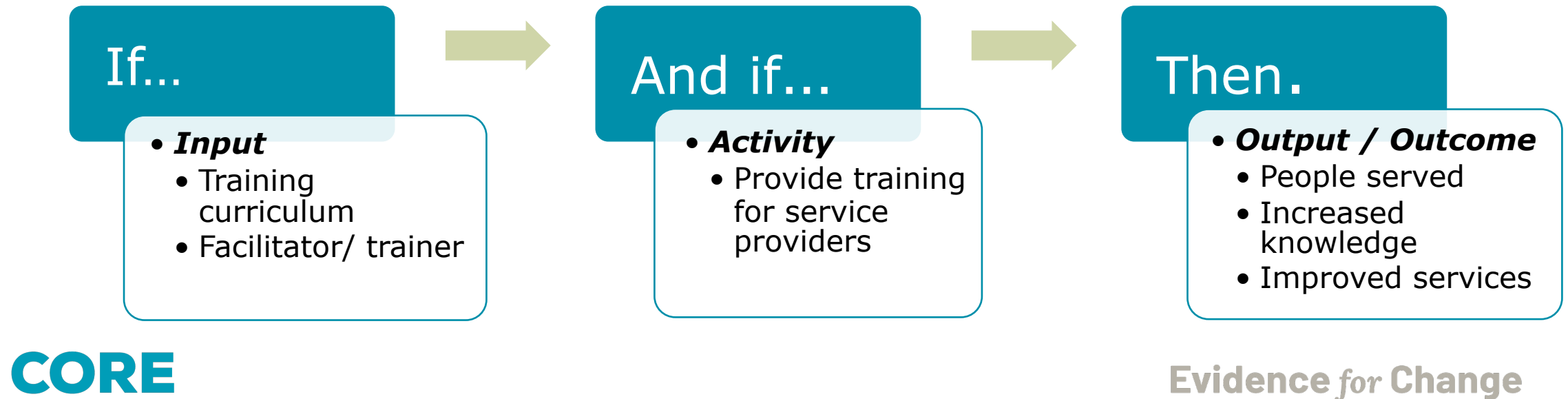- Data communication & storytelling

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4 Steps

1. Clarify your goals and program logic / theory of change

2. Identify audiences & use cases

3. Select (or build) measures or indicators

4. Start tracking

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Step 1: Clarify your goals and program logic

It's hard to determine what's worth measuring if you haven't laid out the program goal(s) and the sequence of how your planned activities should lead to those goals.

"If – then – because" or "so that" thinking

If...
- *Input*
  - Training curriculum
  - Facilitator/ trainer

→

And if...
- *Activity*
  - Provide training for service providers

→

Then.
- *Output / Outcome*
  - People served
  - Increased knowledge
  - Improved services

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Clarifying goals & logic ...

.. Is also an opportunity to:

- Make sure everyone is on the same page about how the program works and what it needs to reach its goals

- Build a shared language

- Engage participants and stakeholders

- Create broader support

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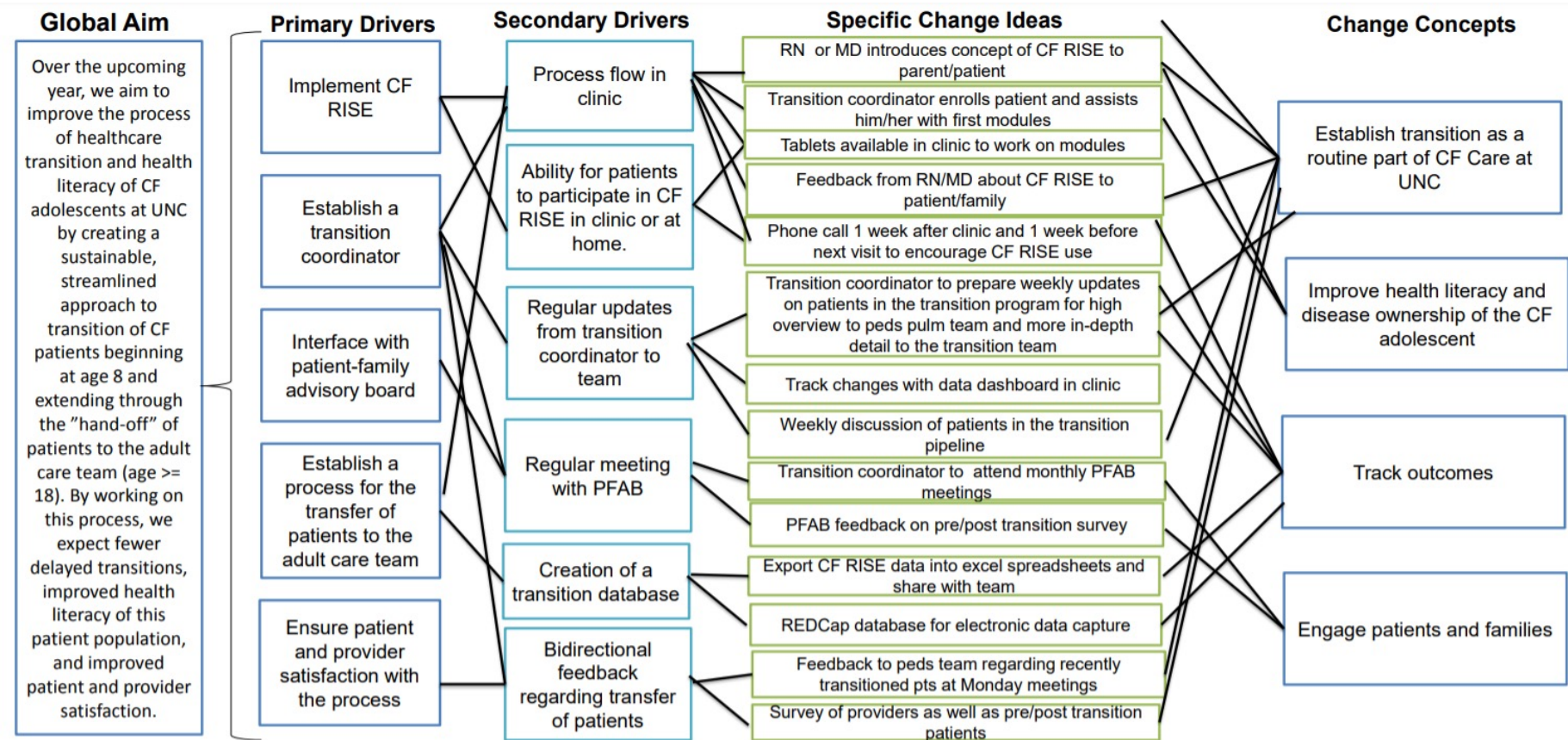Many options for laying out program goals & logic

Logic model

- Usually reads left-to right
- Overall program goal, plus: Inputs → activities → outputs → outcomes
- Common in public health arenas
- Sometimes missing the how/why

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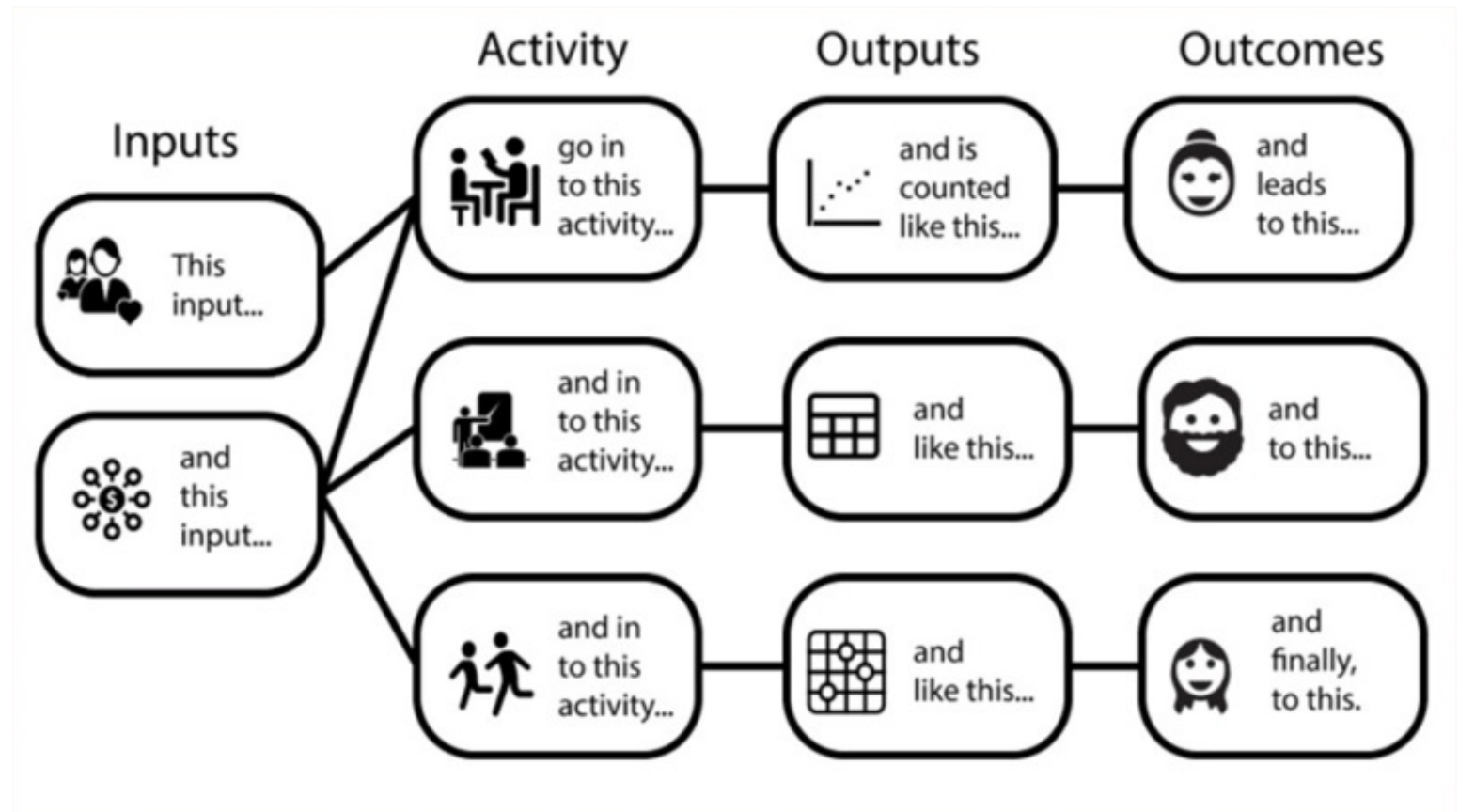
Driver Diagram

- Usually reads right-to-left

- Project aim ← drivers ← change ideas

- Common in health care, CQI

Example from: UNC Institute for Healthcare Quality Improvement

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Theory of Change

- More varied: sometimes visual, sometimes narrative

- Often for more complex initiatives

- Sometimes includes more on causality or conditions (if X happens Y% of the time, then ...)
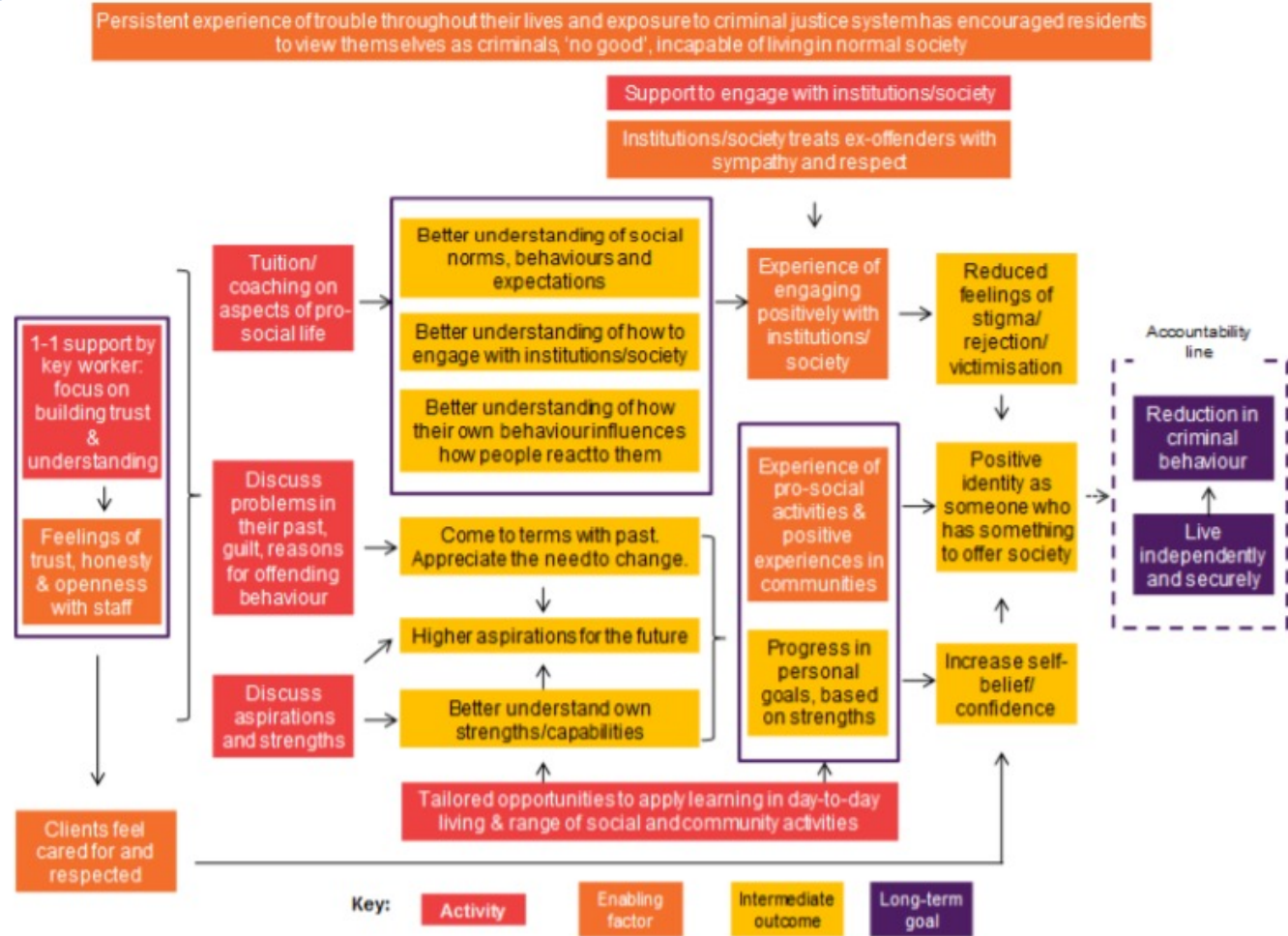
Example from: Creating your theory of change: NPC's practical guide (2014)

Mash up!

- Use whatever works for your program and stakeholders!

- Include the timeframe –how long from start to outcomes?

- Don't just create boxes and draw lines – there needs to be *some* logic or evidence

- Keep things as simple as you can:

  → Anyone should be able to look at / read the program goals & logic and get a decent understanding of what you plan to do and what you hope will happen as a result.

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Pro tip: Keep it as simple as you can

At the logic model repair shop …

So, I'm guessing this is for a comprehensive program-level intervention

freshspectrum.com

External person should be able get a decent understanding of:

a) what you plan to do; and

b) what you hope will happen as a result.

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Resources

Betterevaluation.org	Develop program theory / theory of change	https://www.betterevaluation.org/en/rainbow_framework/define/develop_programme_theory
Social Policy Evaluation and Research Unity (NZ)	Making sense of evaluation – A handbook for the social sector (NZ)	https://dpmc.govt.nz/sites/default/files/2018-03/Evaluation%20Handbook%20Dec%202017.pdf
Community Tool Box (Center for Community Health and Development at the University of Kansas)	Developing a Logic Model or Theory of Change	https://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/logic-model-development/main
Institute for Healthcare Improvement	Driver diagrams	http://www.ihi.org/resources/Pages/Tools/Driver-Diagram.aspx

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Step 2: Identify audiences & use cases

- Who is the audience for your measurement?

- What do you hope will they do with the measurement information?

- What kinds of data & evidence do they need to take action?

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Many different ways to use data for learning

What is going on with…?

How could we intervene to…

What is new or different about…?

Scope & Describe	**Design & Implement**	**Measure & Monitor**
Address Barriers	**Evaluate**	**Improve & Reinvest**

What isn't working with…?

Is there value in…?

Is there a better way to do…?

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Mapping audiences

Audience / Description	What info do they want?	Why / what will they do with it?	What do they find persuasive / helpful?	How do they prefer to consume info?
Funder(s)				
Participants / clients				
Partner(s)				
Staff				
Add rows for more stakeholders				

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Reminder: Equity Implications in Messaging

Heroes

The Problem

Villains   Victims
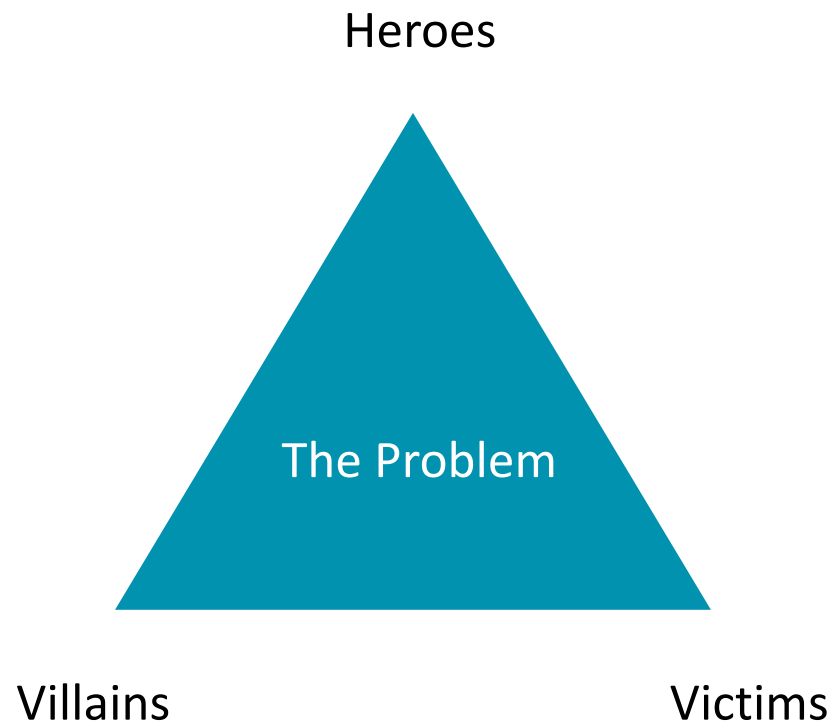
The way you talk about your work is not value-neutral

- How have you presented the problem? Whose problem is it?

- Whose values and concerns are reflected?

- Whose concerns aren't reflected?

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Resources

Kylie Hutchinson / Community Solutions	Tip sheet: Get to know your Evaluation Users	https://communitysolutions.ca/web/wp-content/uploads/2021/01/EvalCollaborators-2021.pdf
Tamarack Institute (CA)	Tool: hosting a data walk	https://www.tamarackcommunity.ca/library/hosting-a-data-walk

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Step 3: Selecting measures or indicators

What do we mean by indicators or measures? **A unit of data that highlights one specific thing.**

In general:

- Narrow enough to be specific
- Can be expressed in terms of who/what/when/where
- Can be qualitative or quantitative

Examples:

- The number of school-age children who receive free or reduced-price school lunches in your region
- Participant perceptions of the quality of skill-building workshops that your program provides

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Hint: Your theory of change is a kind of story!

Example: How well are we connecting patients with community resources for their unmet needs?

Process

Patient needs are identified	Patient is referred	Patient seeks services	Patient needs are resolved

Measures

# of people eligible
# of screenings
# of unmet needs

# of referrals made
# of warm handoffs

# of intake appts.
# of no-show appts.

# of people on waiting list
# of people receiving services
% of people reporting that services are beneficial

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Map It Out
Your Story and Measures

	What is the current situation?	What is being done to intervene in the situation?	What happens after the intervention?	What is the outcome?
Process or situation				
Possible measures				

Look for possible measures across a range of data sources and time frames

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Measure Selection Criteria

Identify factors related to feasibility, importance, and data quality

- We have data for this measure

- This measure is available at the county (or sub-county) level

- This measure aligns with our theory of change or strategic plan

- This measure is really important to [key stakeholder]

- This measure is sensitive to change

Compare measures against the selected criteria

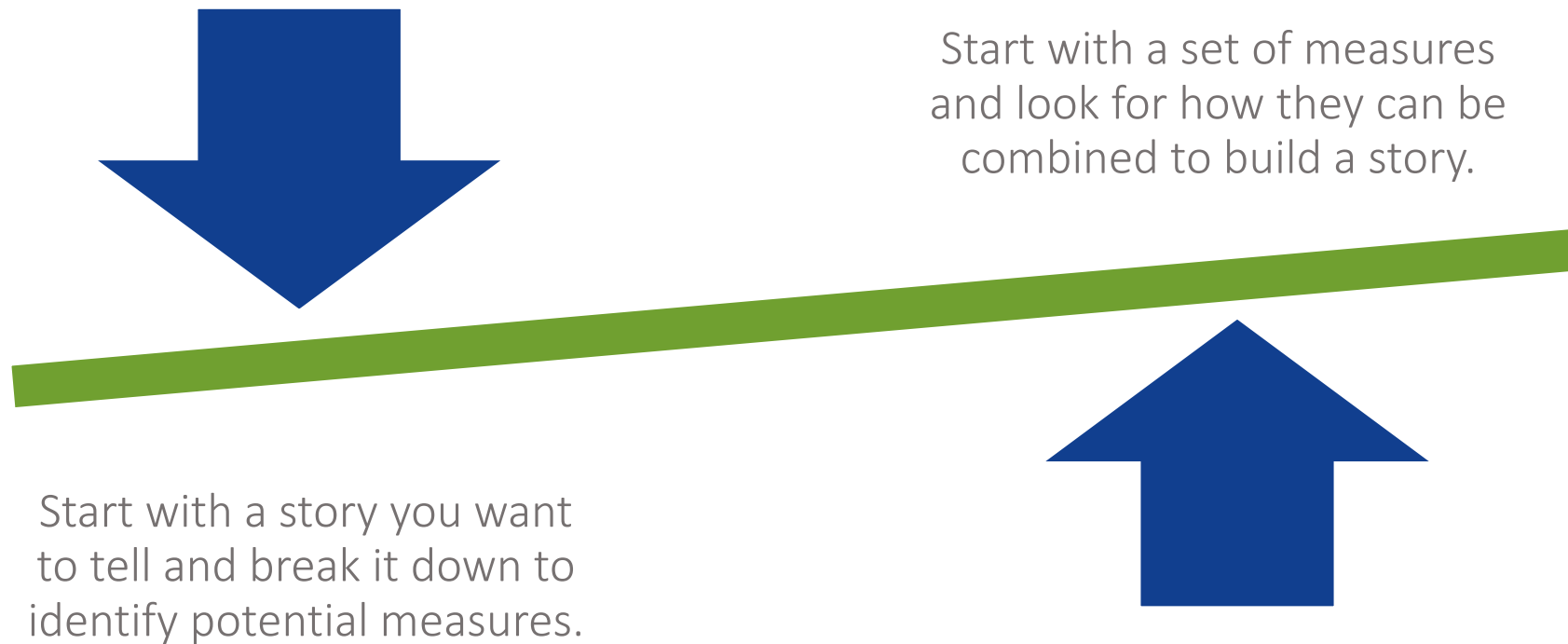Agree on a threshold (e.g. measures must meet at least 4 criteria)

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Measure Selection Criteria
Example: Health Aspects of Kindergarten Readiness

Criteria	Measure 1: Childhood Immunization Status	Measure 2: Assessments within 60 days for children in foster care
Evidence based and relevant	✔	✔
Outcome related	✔	✔
Actionable	✔	✔
Engages the health system	✔	
Engages families	✔	
Family priority		
Family-centered		
High Impact and Transformative		✔
Addresses social determinants		✔
Promotes cross sector collaboration		✔
Promotes equity	✔	✔

Pro tip: It's usually a bit of both

Strike a balance between finding measures that best illustrate your story, and picking among feasible and available measures

Start with a set of measures and look for how they can be combined to build a story.

Start with a story you want to tell and break it down to identify potential measures.

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Resources

Neighborworks	Measuring Health Outcomes: Success Measures Evaluation Tools for Community Development and Health	https://successmeasures.org/publications/measuring-health-outcomes-success-measures-evaluation-tools-community-development-and-0
Oregon Metrics & Scoring Committee	Measure Selection Criteria	https://www.oregon.gov/oha/HPA/ANALYTICS/MetricsScoringMeetingDocuments/Measure_selection_criteria.pdf
Urban Institute & What Works	Building a Common Outcome Framework to Measure Nonprofit Performance	https://www.urban.org/sites/default/files/publication/43036/411404-Building-a-Common-Outcome-Framework-To-Measure-Nonprofit-Performance.PDF

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Q&A

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Who needs a quick break?

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Breakout discussion:

How could you involve your participants / clients in selecting measures, or reviewing & acting on results?

Breakout group observations & ideas

General advice

- Keep it small/manageable

- Focus on organizing and effectively using the data resources you DO have

- "Data" is a broader category of stuff than you might think

- If you are building (a tracking process, a new measure, a participant input mechanism), don't build in silos

Other Resources

Urban Institute	Equitable data practice resources	https://www.urban.org/elevate-data-equity/resources-elevate-data-equity/equitable-data-practice
We All Count (Project for equity in data science)	Data Equity Framework	https://weallcount.com/the-data-process/
HealthAffairs Blog	Finding Effective Ways To Address Social Determinants Of Health	https://www.healthaffairs.org/do/10.1377/hblog20210420.146637/full/
CORE blog	Key ingredients for measuring cross-sector impact	https://blog.providence.org/center-for-outcomes-research-education/key-ingredients-for-measuring-cross-sector-impact

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