

PROGRAM PLANNING AND EVALUATION
PUBH 746
Fall Semester 2011, 3 credits

Instructors

**Diane C. Calleson, PhD, Program
Evaluation**

Clinical Associate Professor
Public Health Leadership Program
4106 McGavern Greenberg
UNC-CH, CB# 7469
Phone: 919-966-1784
Fax: 919-966-6125
Email: calleson@med.unc.edu

Pam Dickens, MPH, Program Planning

Women's Health Coordinator
North Carolina Office on Disability and Health
FPG Child Development Institute
Adjunct Faculty, Public Health Leadership Program
UNC-CH, CB#8185
Phone: 919-966-0871
Fax: 919-966-0862
Email: pam.dickens@unc.edu
Website: <http://www.fpg.unc.edu/~ncodh>

COURSE DESCRIPTION

Program planning and evaluation is a deliberate approach in which public health professionals:

- Identify a health problem
- Develop goals and objectives to address the health problem
- Develop a set of key activities/strategies to reach a set of desired improvements
- Establish a means to measure the attainment of the desired improvements.

Careful planning and evaluation of public health programs are essential competencies for public health professionals. Through this course students will gain a basic understanding of how to implement public health programs and evaluate their effectiveness. As this course is designed to be grounded in public health practice, you will complete the course with the skills necessary to develop both a program and evaluation plan. Given the importance of public health planning and evaluation occurring within the context of interdisciplinary teams, students in this course will also discuss and practice skills for building effective teams and accomplishing individual and group objectives through team work.

COURSE GOALS

1. Define program planning and evaluation.
2. Develop an understanding of the processes involved in planning and evaluating public health programs.
3. Apply skills to organize, design, and evaluate an effective health program and evaluation.
4. Articulate a theoretical perspective of the program planning and evaluating process.
5. Identify characteristics of an effectively functioning team.
6. Demonstrate tools and techniques used to promote team development and to diagnose and respond to conflict.

PRINCIPLE COURSE TEXTS AND WEBSITE RESOURCES

For Purchase

Issel, L. Michele. *Health Program Planning and Evaluation: A Practical, Systematic Approach for Community Health*, 2009.

Online Resources

Centers for Disease Control

<http://www.cdc.gov/eval/evalguide.pdf>

<http://www.cdc.gov/eval/index.htm>

National Institutes of Health, National Cancer Institute: Theory at a Glance: A Guide for Health Promotion Practice, <http://cancer.gov/aboutnci/oc/theory-at-a-glance/page1>

NYS Governor's Office of Employee Relations - Fundamental Team and Meeting Skills, Copyright 2003

<http://www.goer.state.ny.us/train/onlinelearning/FTMS/intro.html>

Teaching and Learning with Technology - Building Blocks for Teams Student Guide, Copyright 2001-2005 Penn State University

<http://tlt.its.psu.edu/suggestions/teams/student/index.html>

Trochim, William M. The Research Methods Knowledge Base, 2nd Edition. Internet WWW page, at URL: <http://www.socialresearchmethods.net/kb/>

<http://www.socialresearchmethods.net/kb/index.php>

W.K. Kellogg Foundation Evaluation Handbook,

www.wkkf.org/Pubs/Tools/Evaluation/Pub770.pdf

W.K. Kellogg Foundation Logic Model Handbook,

www.wkkf.org/Pubs/Tools/Evaluation/Pub3669.pdf

INSTRUCTIONS FOR ASSIGNMENTS

Please remember the **university honor code**, which may be accessed at <http://instrument.unc.edu/> applies to all assignments completed for this class.

Assignments

This course includes the following assignments:

1. A project team charter
2. A team moderator schedule
3. Program planning team assignments (A-G) and the final program plan
4. Evaluation planning team assignments (H-K) and the final evaluation plan
5. One individual case study assignment
6. Peer evaluations of team members
7. Overall course evaluation.

Important notes about assignments

1. All assignments will be due to the instructors by email by 9 am (Eastern Standard Time) on the Tuesday following the assignment week. Email the planning assignments to Pam and the evaluation assignments to Diane.
 - Assignments should be sent in MS Word format as an email attachment. For labeling weekly assignment files, use the week # and your team #, e.g., **week1_team21.doc**.
 - **For the labeling of all final team project files (weekly assignments and final plans),** Use the convention “finalprogram_team name.doc” or “finaleval_team name.doc”.
Number the pages
Place header (team name, week, assignment name) on each page
Also include the file name in the subject heading of your email.
2. 1 or 2 example Program and Evaluation plans are posted on the Blackboard site. Assignment labeling is new for this semester.

Weekly Team Assignments serve as the foundation for this course and should be completed by each team with active participation and shared leadership among all team members. You may utilize the Elluminate, discussion board, email or other tools in Blackboard to facilitate communication and collaboration within your team (see Communication section).

We encourage you to sample the different communication methods to assess which formats work best for your team. Instructors are available to speak with teams at any point in the development of your program plan or evaluation plans. Please email instructors or contact instructors a few days in advance to schedule a consult, when needed.

- Team weekly assignments should be submitted by a selected team member to the instructors via email by the dates indicated in the syllabus.
- Weekly team assignments will not be graded. Instead, each team will receive feedback from the instructors on each assignment.
- Your team should review and consider incorporating this feedback carefully, because the final program plan and evaluation plans will be graded, which contribute to 70% of your grade in this course, will be closely based on the work done in the team assignments during

the course of the semester. Additionally, this course builds sequentially on previous assignments, so it is important to build a strong foundation for subsequent team work.

- While you will not receive a grade for team process assignments, our expectation is that these assignments will contribute to the development of a strong team process and the final program and evaluation plans– which in turn serves as the foundation for accomplishing individual and group projects for this course.
- If you have not received feedback from the instructor by Friday of the week you submitted the assignment, please contact the instructor.

Final Program Planning and Evaluation Team Assignments.

- The program plan final assignment will be due on **Oct 25, 2011** after the program planning weekly assignments (A-F).
- The evaluation final assignment will be due **12/13/10** at the completion of the evaluation team assignments. (H-K).

Assignment Details

I. Project Team Charter and Moderator Schedule

- In the beginning of the class, after everyone has signed up for a team, we post the name of your team members and provide a discussion forum for your teamwork. This is the prompt to initiate communication with team members via the Discussion Forum or Eluminate to meet to complete your project team charter and team moderator schedule.
- Specific guidance for developing your project team charter and your team moderator schedule are included on the sample templates provided as a Word document under assignments for Week 1.
- Post your completed project team charter and moderator schedule to your team's shared workspace/discussion board area on Blackboard and email a copy to Pam and Diane.

II. Final Program Plan

The final program plan should include the following sections, including a Table of Contents:

- Try to limit to about 15 pages of text (sections 2-8).
1. Cover page (title, course number, team members' names)
 2. Overview of the plan
 3. Context of program plan
 4. Relevant program theories
 5. Goals and objectives
 6. Logic model
 7. Program Implementation (activities/strategies, staffing, estimated timeline, detailed budget)
 8. References
 9. Appendix, if needed. (charts, graphs, material examples, etc.)

III. Evaluation of Public Health Program

NOTE: For this section of the course, you will be creating an evaluation plan using one of the program plans created by another team in the class. This will foster a more realistic evaluation where you are being asked to create an evaluation plan of a proposed program. We will provide instructions for communicating with the team whose program plan you receive. As an evaluator, you'll likely have clarifying questions for that team about the plan and how to move forward as an evaluator.

The final evaluation assignment should include the following sections, including a Table of Contents. The page length will vary depending on the length of your evaluation planning table.

1. Cover page (title, course number, team members' names)
2. Rationale and Approach to the Evaluation
3. Evaluation Study Design
4. Evaluation Methods
5. Evaluation Planning Table
6. Dissemination Plans
7. IRB considerations

INSTRUCTIONS FOR COMMUNICATION WITH TEAM MEMBERS

In order to effectively and efficiently create your program and evaluation plan, this course requires a sophisticated level of ongoing communication with your team members. We are offering you and your team members the use of Adobe Connect and Blackboard discussion forums for your team.

1. Web Conferencing

Elluminate is a web conferencing tool that allows you not only to communicate but also to work on shared documents in an online meeting space. If you have a broadband internet connection and a computer with a microphone or a headset, we encourage you to try this option. Links to meeting spaces and instructions for use will be available in the Blackboard course in your team meeting spaces. Each team will be assigned a separate meeting room so it will be available to you and your team at all times. Note that Elluminate is the campus-supported tool.

2. Discussion Forum

We recommend that the discussion forum on Blackboard be used as a format for team members to work on team assignments. There, your team can have an open discussion forum for members to post assignment files, comment on the program or evaluation topic. This is your team's space to field your ideas and develop your weekly assignments, in addition to the use of Elluminate. If your team has questions or would like specific feedback from the instructors, please email Pam or Diane (respective of course content), or ask to set up a communication with us. We will be reading and commenting on some of your communications in the discussion forum to keep you on track but this is primarily your workspace.

We look forward to communicating with you about your team project and individual assignment. The best way to communicate with instructors is via email, individual phone calls or team meetings via Elluminate. Should questions arise as you work on these assignments, please send us an email with questions or feel free to contact us by phone.

TEAM AND INDIVIDUAL COMMUNICATION WITH INSTRUCTORS

During the semester teams and instructors will be together online developing knowledge, skills and competencies required to effectively plan public health programs while laying a foundation for program evaluation.

- Our goal as instructors will be to facilitate individual learning, group interaction and collaborative team work.
- Students are expected to actively engage in a variety of individual and team-based activities throughout the course designed to promote online collaborative learning, team-based problem-solving and public health practice.

Contacting Instructors

- For the Program Planning part of the course, all assignments or questions should be emailed to Pam at pam.dickens@unc.edu; 919-966-0871
- For the Program Evaluation part of the course, all assignments or questions should be emailed to Diane at calleson@med.unc.edu; 919-966-1784

INSTRUCTOR AND INDIVIDUAL COMMUNICATION WITH THE CLASS

Announcements for Frequently Asked Questions

In an online course, we have learned how important it is for our lectures to be straightforward and our assignments to be clearly written. However, you will still have excellent questions about the class that may not have been addressed. When such questions arise, we will post an answer to the question on the announcement page so that everyone can benefit from the response. Please use the announcement page to keep abreast of course details and updates.

ATTENDANCE AND PARTICIPATION REQUIREMENTS

Full participation is very important online and is required for this course. You will be expected to meet the required assignments/postings each week.

- With each new week, a new set of tasks is assigned, each building on lessons from the previous week. **Thus, the pace moves quickly throughout this course.**
- To be considered in attendance during an online week, we expect you to be involved in the discussions each week and to meet with your team at its agreed upon posting commitment schedule based on the team charter.
- A peer evaluation will be completed by group members four times. The peer evaluation following the completion of your program plan and evaluation plan count as part of your teamwork grade.

Moderator

We expect each team member will take the lead in moderating and facilitating the discussion on at least one weekly assignment, as equal (or nearly equal) number of times during the semester. Your team will complete a Team Moderator Schedule during Week 1 to clarify dates, roles and responsibilities for facilitation, decision-making, managing work flow and submission of assignments. While the initial schedule can be treated as a “working document” for your team, we strongly recommend that team members take every opportunity to share leadership and participate equitably. (See section I under Assignments).

As the moderator,

- Establish a schedule in the beginning of each week, begin the discussion, let team members know when they should make postings in order for their comments to be included in the team assignment.
- Establish a finish date for the team’s contributions to weekly assignments.
- Each week, at the end of the discussion, the moderator will summarize responses to write the draft assignment and ask other team members to review and edit the assignment prior to submission by the designated date/time on the schedule.
- The moderator will email the final weekly assignment to the instructor.

TEAM PROCESS EVALUATION

You will be asked to evaluate your team members as well as your team contribution - This will account for 10% of your grade.

Items to consider in your evaluation:

- The team member actively participated in team assignments.
- The team member accomplished tasks on time.
- The team member's work reflected an acceptable level of thought and effort.
- The team member functioned as a valuable member of the team by supporting the efforts of the other team members.
- Note that there will be an open-ended item for other feedback.

If instructors notice any significant issues with a team member’s participation, we will contact that individual confidentially either by email or by phone.

GRADING

Grades will be earned based on the following scale

92-100: H
75-91: P
<75: L

Your individual course grade will be based on the following components

| | |
|-----------------------|-----|
| Team Program Plan | 30% |
| Team Evaluation Plan | 30% |
| Individual assignment | 20% |
| Peer Evaluations | 10% |
| Instructor Evaluation | 10% |

Note: Students will evaluate their team members' participation during the course for 10% of the grade.

COURSE CALENDAR

IMPT: *We strongly encourage teams to edit returned assignments soon after they are returned so that you are not in a crunch a few days before the plan is due.*****

| Week | Date | Title | *Assignment |
|------------|-------|---|--|
| 1 | 8/23 | Introduction Tools & Techniques for Working in Teams: Intro to Team Development | Introductions, Sign up for a group by 8/26 Individual Assignment Team Assignment A, Due August 30th |
| 2 and 2A | 8/29 | Overview of Program Planning Prioritizing Program Planning Issues NOTE that this is indicated as Week 2 and Week 2a on Blackboard. | Team Assignment B, Due September 6th |
| 3 | 9/6 | The Context of Program Planning: Challenges and Strategies for Success Tools & Techniques for Working in Teams: Addressing Common Issues in Team Development | Team Assignment C, Due September 13th |
| 4 | 9/ 12 | Using Program Theory Frameworks | Team Assignment D, Due September 20th PEER evaluation |
| 5/6 | 9/19 | Developing Program Goals and Objectives Logic Models **This is a two week assignment. | Team Assignment E/F, Due October 4th |
| 7 | 10/3 | Program Implementation Sustainability | Team Assignment G, Due October 11th |
| 8 | 10/17 | Final Program Plan Due | The Final Program Plan Due 10/25 at 5pm, <i>Fall Break begins 5pm on 10/20</i> <i>Graded PEER Evaluation</i> |
| 9 | 10/24 | Introduction to and Rationale for Program Evaluation | The Final Program Plan Due 10/25 at 5pm |
| 10 | 10/31 | Preparing for an Evaluation | Team Assignment H, Due November 8th |
| 11 | 11/7 | Evaluation Plan, Part 1: Developing Evaluation Questions | Team Assignment I, Due November 15th |
| 12 | 11/14 | <ul style="list-style-type: none"> • Evaluation Plan, Part 2: Determining Evaluation Methods • Learning Outcomes: Kirkpatrick Model | Team Assignment J, November 22nd PEER Evaluation |
| 13 | 11/21 | Evaluation Politics: Lessons Learned | Individual assignment, Due Friday, December 2nd , Happy Thanksgiving |
| 14 and 14A | 11/28 | Collecting and Analyzing Evaluation Data Communicating Findings and Using the Results | Team Assignment K, L Due Monday, December 5th Graded Peer Evaluation |
| 15 | 12/12 | Final Program Plan Due | Final Program Plan Due, Tuesday, December 13th Course Evaluation |

***Unless otherwise noted, all assignments and discussion summaries are due emailed to the instructors by 9:00 am on Tuesday following the assignment week.**

PROGRAM PLANNING

WEEK 1: (I) Course Introduction, and (II) Tools and Techniques for Working in Teams: Intro to Team Development

Objectives

At the end of this session, learners will be able to:

- Explain the elements required for satisfactory completion of this course, including:
 - Completion of online lectures
 - Readings
 - Participation in a team project culminating in the development of a program plan by the middle of the course and evaluation plan by the end of course
 - Participation in team discussions to develop each team assignment.
- Discuss the context for team work in public health
- Describe the qualities and characteristics of a team and the process of working as a team rather than a group
- Identify strategies and approaches that promote team development and optimize the potential contribution of team members

Required Readings

Issel, Chapter 1, Health Program Development and Evaluation, p. 3-34

Characteristics of a Team

NYS Governor's Office of Employee Relations - Fundamental Team and Meeting Skills,
Copyright 2003

http://www.goer.state.ny.us/Training_Development/Online_Learning/FTMS/100s1.html

Team Roles and Responsibilities

NYS Governor's Office of Employee Relations - Fundamental Team and Meeting Skills,
Copyright 2003

http://www.goer.state.ny.us/Training_Development/Online_Learning/FTMS/200s1.html

Slides and Lecture: Introduction

Slides and Lecture: Tools and Techniques for Working in Teams: Intro to Team Development

Introductions and Assignment

Introductions

Please share with your classmates a brief overview of (2 to 3 sentences at most) your public health experience and then elaborate a bit on your interests outside of work and school, and if you dare, one surprising thing about yourself.

Individual Assignment:

Each individual should choose a team to work with the remainder of the semester to develop a program plan and evaluation plan. Remember to sign up early so that you can join a team with the health topic of your interest! See the calendar for sign-up date expectations.

Team Development Assignment A

Complete Project Team Charter and Team Moderator Schedule

Your initial team assignments are to develop a project team charter and a team moderator schedule. See Word documents under Week 1 for the full instructions. Post your team charter and team moderator schedule to your team's discussion board space on Blackboard as well as email a copy to Pam and Diane. **We encourage you to try using web conferencing this first week to complete these documents.**

WEEK 2: An Overview of Program Planning

Objectives

At the end of this session, learners will be able to:

- Describe the program planning and evaluation cycle
- Define program planning
- Describe planning methodologies for health planning
- List approaches utilized in planning health programs
- Identify steps in program planning
- List possible target levels for intervention

Required Readings

Issel, Chapter 3, Planning for Health Programs and Services, p. 73-108

The NC Domestic Violence Program Survey: A Description of Service Provision Focused on Meeting the Needs of Special Populations (Scan the entire report, and read carefully the section and figures on disabilities.).

Slides and Lecture: Overview of Program Planning

WEEK 2A: (1) Prioritizing Program Planning Issues

Objectives

At the end of this session, learners will be able to:

- Identify data to help set priorities for your program activities
- Identify health plans and policy frameworks to help set priorities for your program activities
- Describe the basis of the Access for All project planning strategies
- Understand the stages of team development
- Differentiate between productive and non-productive team behaviors
- Identify different types of team conflicts and approaches to problem resolution.

Required Readings

Healthy People 2020: The Road Ahead – Cardiovascular Disease:
<http://healthypeople.gov/2020/topicsobjectives2020/overview.aspx?topicid=21>

Casteel C, Martin SL, Smith JB, Gurka KK, Kupper LL. *Inj Prev.* 2008 Apr;14(2):87-90.
National study of physical and sexual assault among women with disabilities.

Additional References (optional)

Healthy Carolinians: <http://www.healthycarolinians.org/>
Eat Smart Move More: <http://www.eatsmartmovemorenc.com/>
Call to Action to Improve the Health and Wellness of Persons with Disabilities. 2005.US Surgeon
General. <http://www.hhs.gov/news/press/2005pres/20050726.html>

Teaching and Learning with Technology - Building Blocks for Teams Student Guide, Copyright
2001-2005 Penn State University

Unproductive Behaviors - <http://tlt.its.psu.edu/suggestions/teams/student/responsibility.html>

Conflict Resolution - <http://tlt.its.psu.edu/suggestions/teams/student/conflicts.html>

Slides and Lecture:

1. Prioritizing Program Planning Issues,
2. Addressing Common Issues in Team Development

Team Assignment: B

In 1-2 pages, identify existing health data, health plans, and /or policy frameworks related to your team's assigned health problem that help your group set priorities for activities of your program plan. This information may suggest narrowing your focus population, such as specific ages or gender. Use your judgment!

This program plan is an introduction to developing a small plan. As a result, you will develop your program plan throughout the weeks, with only a **budget** that can range from **\$50,000- \$75,000 per year**. (Evaluation costs will be addressed in the 2nd half of semester). This can impact your decisions you make for planning the intervention.

WEEK 3: (I) The Context of Program Planning and Challenges and Strategies for Success.

Objectives

At the end of this session, learners will be able to:

- Describe the context of the program planning process
- Identify factors to consider that may support or inhibit a program plan
- Apply context issues to a real program plan
- Identify some challenges one may face during program planning
- List some strategies that can promote success

Required Readings

Issel, Chapter 2: Relevance of Diversity and Disparities to Health Programs, p. 37-71

Slides and Lecture

Lecture 1: The Context of Program Planning

Lecture 2: Challenges and Strategies for Success

Team Assignment C:

Write a 1-2 page paper that defines the context of your program planning regarding your health topic. Identify challenges you might face and possible solutions to use to move forward with planning.

Consider:

- the political environment,
- consistency with local,
- state and national priorities,
- acceptability to providers and recipients,
- possible financial resources,
- technical feasibility,
- stakeholders and other factors.

WEEK 4: Using Program Theory Frameworks

Objectives

At the end of this session, learners will be able to:

- Define and distinguish between theory, concepts, constructs, variables, and models
- Identify how theoretical frameworks are useful in program planning, implementation, and evaluation
- Describe the benefits of utilizing theory
- Gain understanding of specific theoretical frameworks at the individual, interpersonal, and community levels

Required Readings

National Cancer Institute, Theory at a Glance: A Guide for Health Promotion Practice (Read Introduction, Section I and Section II)

<http://cancer.gov/aboutnci/oc/theory-at-a-glance/page1>

Kobetz E, Vatalaro K, Moore A, Earp JA. Taking the transtheoretical model into the field: a curriculum for lay health advisors. *Health Promot Pract.* 2005 Jul;6(3):329-37.

Additional References (optional)

Issel, Chapter 6: Program Theory and Interventions Revealed, p. 177-208

Leslie A. Lytle and Cheryl L. Perry, [Applying Research and Theory in Program Planning: An Example from a Nutrition Education Intervention](#), *Health Promotion Practice*, Jan 2001; 2: 68 - 80.

Slides and Lecture: Program Theory

Team Assignment: D

There have been a number of identified models published in public health journals and texts and best practices that help explain how theory can inform the development of successful programs.

- Submit a 1-2 page paper on what theories you will utilize to guide your choice of activities in the development of your program plan to lead to your desired outcomes. Correlate how the theories you choose impact each activity you are choosing for the plan.

WEEK 5: Developing Program Goals and Objectives

Objectives

At the end of this session, learners will be able to:

- Define terms: goals, objectives, and strategies
- Apply information learned to develop goals, objectives, and strategies for a program plan

Required Readings

- Issel, Chapter 6: Program Objectives and Setting Targets, p. 211-244
- www.marchofdimes.com/files/HI_SMART_objectives.pdf

Additional References (optional)

Review the Grant Application Toolkit at the Community Toolbox,
http://ctb.ku.edu/en/dothework/tools_tk_14.aspx

Slides and Lecture: Developing Program Planning Goals and Objectives

Team Assignment: E

Develop goals and objectives for your program plan. Be sure that objectives are **(SMART)-specific, measurable, achievable, and time-specific**, utilizing format from the lecture.

- You should include both short term (1-3 years) and long term (3-5 years) objectives for your program plan.
- Try to develop no more than 4 short term and 4 long term objectives.

*The instructor will set up meetings times with teams as needed during this week to answer any questions regarding goals and objectives.

Note that Week 5 and 6 are turned in on the due date for Week 7. Please see course calendar.

WEEK 6: Introduction to Logic Models

Objectives

At the end of this session, learners will be able to:

- Define a program planning logic model
- Identify the purpose and benefits of a logic model
- List several logic model approaches
- Describe the basic components of a logic model
- Utilize a basic logic model template to develop a logic model for your program plan

Required Readings

WK Kellogg Foundation, Logic Model Development Guide

<http://www.wkcf.org/Pubs/Tools/Evaluation/Pub3669.pdf>

Power Point Presentation, adapted by Dr. Betsy Randall-David, Empowerment Evaluator for the NC DHHSS Injury and Violence Prevention Branch from the work of Ellen Taylor-Powell at the University of Wisconsin Cooperative Extension Service, see Blackboard for Link.

Additional References (optional)

CDC Evaluation Working Group: Logic Model Resources

<http://www.cdc.gov/eval/resources.htm#logic%20model>

- This site includes logic model resources from CDC, Harvard, the World Bank, the United Way and Aspen Institute.

Cheadle, Allen, et.al., [Evaluating the California Wellness Foundation's Health Improvement Initiative: A Logic Model Approach](#), *Health Promotion Practice*, Vol 4, No. 2 (2003) p. 146-156

Slides and Lecture: Logic Models

Team Assignment: F

Using the basic logic model template on pg.17 from the Kellogg Foundation Guide, develop a 1-page logic model for your program plan. Utilize your goal and objectives to guide and align with the logic model.

Remember to identify

- Inputs (what resources you have – needs assessments, expertise, and partnerships),
- Activities,
- Outputs (what you expect to achieve as evidence of service delivery)
- Short term outcomes (1-3 years)
- Long term outcomes (3-5 years)
- Impact (expected changes within 7-10 years).

The instructor will set up meeting times with teams during this week to answer any questions regarding logic models. Please schedule a meeting if desired.

WEEK 7: Program Implementation and Sustainability

Objectives

At the end of this session, learners will be able to:

- List key elements in program implementation
- Identify specific strategies / activities to create your implementation plan
- Become familiar with steps to develop a work plan for implementation of a proposed intervention.

Required Readings

Issel, Chapter 8: Logistics of Program Implementation, p. 247-282

Franklin VL, Greene A, Waller A, Greene SA, Pagliari C. Patients' engagement with "Sweet Talk" - a text messaging support system for young people with diabetes. Maternal and Child Health Sciences, Ninewells Hospital and Medical School, Dundee, UK

Link: <http://www.jmir.org/2008/2/e20>

Sustainability Planning Workbook: Building a Sustainability Initiative, Module I. The Finance Project. 2003, pgs. 5-9.

Additional References (optional)

University of Kansas Community Toolbox: Implementing Promising Community Interventions, http://ctb.ku.edu/tools/en/part_G.htm

Detailed Budget Example, Department of Justice grant

Slides and Lecture:

Program Implementation

Program Sustainability

Assignments

Team Assignment G

Develop an implementation plan in narrative form that includes goals and objectives, with strategies/ activities that you will use to meet the objectives, the plan's resource needs (human and fiscal/budgetary) and a timeline. This work plan will form the core of your final program plan and will guide the implementation of your intervention.

FINAL PROGRAM PLAN – Due Oct 25, 2011

This assignment is the final culmination of your weekly assignments to create a complete intervention. The final program plan should be limited to 15 pages (including sections 2-8) and table of contents. You can include an appendix, if needed.

Include the below sections:

1. Cover page (title, course number, team members' names)
2. Overview of the plan
3. Context of program plan
4. Relevant program theories
5. Goals and objectives
6. Program Implementation (activities/strategies, staffing, estimated timeline, detailed budget)
7. Logic model
8. References
9. Appendix, if needed. (charts, graphs, material examples, etc.)

PROGRAM EVALUATION

WEEK 9: Introduction to and Rationale for Program Evaluation

Objectives

At the end of this session, learners will be able to:

- Define program evaluation
- Discuss the context and rationale for program evaluation
- Define the ‘balance between the call to prove with the need to improve’
- Discuss the three basic levels of program evaluation

Required Readings

Chapter 2 and 3, W.K. Kellogg Foundation Evaluation Handbook,
<http://www.wkkf.org/knowledge-center/resources/2010/W-K-Kellogg-Foundation-Evaluation-Handbook.aspx>

Patton, MQ. Utilization-Focused Evaluation, The New Century Text, 3rd. Sage Publications: CA, 1997. Pages, 1-18, Chapter 1

Slides and Lecture: Introduction to and Rationale for Program Evaluation

Team Assignment

Review “new” program plan. During this week, review the program plan that we will send you from one of the other teams. You will use this program plan to develop your evaluation plan, rather than the plan your team developed. This will be more real world as an external evaluator.

WEEK 10: Preparing for an Evaluation

Objectives

At the end of this session, learners will be able to:

- Identify key roles and skills of an evaluator
- Develop skills in developing and implementing an evaluation (steps for this lesson)
 - Identify the rationale for the evaluation
 - Identifying the key stakeholders
 - Budget the cost of an evaluation

Required Readings

Centers for Disease Control, <http://www.cdc.gov/eval/evalguide.pdf>, Read 1-18. Skim pages 1-36

Chapter 5, pgs. 47 - 63, W.K. Kellogg Foundation Evaluation Handbook, <http://www.wkkf.org/knowledge-center/resources/2010/W-K-Kellogg-Foundation-Evaluation-Handbook.aspx>

Patton, MQ. Utilization-Focused Evaluation, The New Century Text, 3rd. Sage Publications: CA, 1997. Page 21.

Slides and Lecture: Preparing for an Evaluation

Team Assignment

In preparing for an evaluation, it is important to consider the why a program needs to be evaluated, the roles you might take on as an evaluator, the stakeholders' questions, and any potential challenges you may encounter in implementing the evaluation. Please address the following questions in two to three pages double spaced, drawing on the readings and lectures for this lesson:

1. What the primary reasons this program should be evaluated? (see CDC reading, table on page 5)
2. How would you describe your role as an evaluator for this program? Would you recommend an internal or external evaluator, or both? Why? What are the key skills and/or characteristics the evaluator would need to evaluate this program?
3. Which stakeholders would need to be involved in the evaluation and what might be the key questions the different stakeholders would be most concerned with? In what ways might you involve them throughout the process?
4. What are some potential challenges the evaluation might encounter?

WEEK 11: Creating an Evaluation Plan, Part 1: Using a Logic Model and Developing Evaluation Questions

Objectives

At the end of this session, learners will be able to:

- Describe how to use a project logic model in developing evaluation questions
- Determine implementation and outcome evaluation questions.
- Describe how to use project objectives in developing evaluation questions.

Required Readings

Chapter 4, pages 35-48, W.K. Kellogg Foundation Logic Model Development Guide, www.wkkf.org/Pubs/Tools/Evaluation/Pub770.pdf

Mary Davis, DrPH, Director of Evaluation Services, NC Institute for Public Health, PowerPoint Lecture on Using a Logic Model

<http://www.re-aim.org/about-re-aim/applying-the-re-aim-framework.aspx>

This resource and evaluation framework supports the need for program theory. Thus, when you are evaluating a program, you want to work with the program to ask evaluation questions that are in line with the focus of the program (individual level, organizational level, etc.). If your short and long term objectives are in line with your program theory, your evaluation questions will be fairly easy to develop.

Recommended Resources

Copyright ©2006, William M.K. Trochim. <http://www.socialresearchmethods.net/kb/>. This is an **excellent** online resource on evaluation, methods, and study design.

Fund for the Improvement of Postsecondary Education, <http://www.ed.gov/about/offices/list/ope/fipse/evaluate.html>

- This site provides useful information for creating evaluation planning documents

Slides and Lecture: Creating an Evaluation Plan, Part 1: Developing Evaluation Questions

Learning Outcomes: Kirkpatrick Model

Team Assignment:

There are two parts to this assignment. For this week's assignment, create an evaluation table for each of your objectives. This will involve three tables for the short term objectives and three for the long term objectives. Please see examples in the course materials for this week. Your task for this week is to create the tables and the evaluation questions for each objective.

Please refer to the student examples as a guide and do not hesitate to contact Diane (a lot) at this point to field questions and get feedback. Teams often find this is a very good time to set up a call with Diane.

WEEK 12: Developing an Evaluation Plan, Part 2: Determining Evaluation Methods and Design

Objectives

At the end of this session, learners will be able to:

- Describe implementation and outcome methods
- Distinguish between quantitative and qualitative methods
- Develop an evaluation plan with research questions and methods

Required Readings

Centers for Disease Control, <http://www.cdc.gov/eval/evalguide.pdf>, Read pages 37-46; 50-59.

Chapters 12, 15. Issel, L.

Important Note: Focus on the information covered in the lecture from Issel. Due to the fact that this is a short course in evaluation, the expectation is that you gain a basic understanding of evaluation design and methods. If you want to lead evaluations, it will be important to take separate coursework in this area.

Recommended Reading

Review or reread 69-95. W.K. Kellogg Foundation Evaluation Handbook, www.wkkf.org/Pubs/Tools/Evaluation/Pub770.pdf

Copyright ©2006, William M.K. Trochim. <http://www.socialresearchmethods.net/kb/>. This is an **excellent** online resource on evaluation, methods, and study design.

Slides and Lecture: Developing an Evaluation Plan, Part 2: Deciding Upon Evaluation Methods

Team Assignment: Methods, Evaluation Planning Table (required for feedback)

Please review the Issel, the CDC readings, and student project examples for guidance.

In two to three pages, provide the following two sections:

- (1) a description of the *study design* (e.g., quasi-experimental, etc.)
- (2) an overview of the *study methods* (e.g., pre/post surveys, focus groups, observation, chart review etc.).
- (3) Include the method(s) in the evaluation table. This involves stating a method(s) for each evaluation question in your evaluation tables. Please see examples provided.

WEEK 13: Lessons Learned: Evaluation Politics

Objectives

At the end of this session, learners will be able to:

- Identify key issues in evaluation and program planning politics
- Describe why evaluation is a value-oriented and political activity.
- Suggest strategies for conducting an evaluation in a political context.

Required Readings

Patton, MQ. Utilization-Focused Evaluation, The New Century Text, 3rd. Sage Publications: CA, 1997. Chapter 14.

Slides and Lecture: Lessons Learned: Evaluation Politics

Individual Assignment

For this assignment, you will be asked to interview a program planner and/or evaluator about their work. We will provide a form with questions to guide your interview. The assignment will involve both description and critical analysis of the program and its evaluation.

In order to do this assignment, you will need to identify someone to interview, ideally at least a couple weeks prior to the interview. We will remind you early in the semester to begin making contacts and will provide guidance in selecting a programmer and/or evaluator. The assignment will be posted on Blackboard.

Note: This assignment is worth 20% of your grade.

- Length: 4 pages total,
- Double-spaced.
- Cite references.

WEEK 14: Collecting and Analyzing Data, and Managing the Process

Objectives

At the end of this session, learners will be able to:

- Distinguish between research and evaluation
- Learn skills needed for gaining institutional review board approval (IRB)
- Provide guidelines for authorship
- Identify research ethics in program evaluation

Required Readings

Review or reread 84-95. W.K. Kellogg Foundation Evaluation Handbook, <http://www.wkkf.org/knowledge-center/resources/2010/W-K-Kellogg-Foundation-Evaluation-Handbook.aspx>

Chapter 17, Issel, L.

Slides and Lecture: Collecting and Analyzing Data

Team Assignment: IRB and Ethics

Review the UNC Institutional Review Board site (<http://ohre.unc.edu/>). You DO NOT need to fill out the IRB application. Your task is to summarize as follows:

1. Are there any key issues your team would need to address in this IRB application including :
 - risks for human subjects;
 - concerns related to confidentiality of the data;
 - consenting human subjects.
2. What kind of IRB application would you apply for (exempt, full review)? Why?

WEEK 14A: Communicating Findings and Using the Results

Objectives

At the end of this session, learners will be able to:

- Describe effective strategies for managing a program evaluation (e.g. hiring statisticians, project timelines, flexibility, etc.)
- Describe effective strategies for communicating evaluation findings to stakeholders
- Outline the key sections of a progress and a final evaluation report
- Describe how to develop a set of recommendations based on evaluation findings
- Suggest ways in which evaluators can involve the program staff in using the evaluation findings for program improvement.

Required Readings

Centers for Disease Control, <http://www.cdc.gov/eval/evalguide.pdf>, Read pages 65-69; 74-76.

Review or reread pages 96-99. W.K. Kellogg Foundation Evaluation Handbook, <http://www.wkkf.org/knowledge-center/resources/2010/W-K-Kellogg-Foundation-Evaluation-Handbook.aspx>

Chapter 17, Pgs. 537-548. Issel, L.

Recommended

Bathing Without a Battle: CD-ROM and Videotape Training on Person-Centered Bathing of Individuals with Dementia, Project Final Report, August, 2004. Sloane, P., Calleson, D., Barrick, A.L. A Joint Project of the Institute on Aging and the Cecil G. Sheps Center Program on Aging, Disability and Long-Term Care, University of North Carolina at Chapel Hill, and the School of Nursing, Oregon Health Sciences University

Slides and Lecture: Communicating Findings and Using the Results

Team Assignment: Communicating Findings and Using the Results

- Summarize in two paragraphs your proposed plans for dissemination (presentations to community groups, stakeholders, relevant newsletters and journals, etc.). In Lecture 10, we covered the fundamentals of planning an evaluation budget.

Final Evaluation Plan Due:

The final evaluation plan should include the following key sections. The first section can be drawn from the *Preparing for an Evaluation* assignment. The second section is an overall summary of the focus of the evaluation.

Evaluation Plan Sections, including a Cover Page and a Table of Contents

1. Rationale and Approach to the Evaluation
2. Evaluation Study Design
3. Evaluation Methods
4. Evaluation Planning Table
5. Dissemination Plans
6. IRB application