Worksheet 1. Engaging Partners in the Evaluation. See Toolkit Slides 16–18 for more information.

Which organizations and partners need to be at the table?	**Who** should participate in evaluation design, implementation, and review?	Will they participate in your evaluation workgroup?	**How** will you keep them informed and/or encourage participation, especially if they aren't part of the workgroup?
Organization name	Name and/or role of specific person(s)	Yes or No	Example: Integrate as agenda item on existing board meetings; identify champion to ensure board involvement.

Adapted from: *Building Capacity in Evaluating Outcomes: A Teaching and Facilitating Resources for Community-based Programs and* Organizations, University of Wisconsin-Extension, 2008.

Worksheet 2a. Create a Logic Model — Questionnaire. See [Toolkit Slides 19–23] for more information.

To inform the creation of a logic model, please answer the following questions about a program or set of activities you are interested in evaluating. Your responses do not need to be inclusive of all of your organization or coalition's programs or activities.

Topic	Question	Notes
Impact/Goal	What problem or issue are you trying to address?	
Activities	What specific activities (convenings, press releases, training, services, advocacy, etc.) will you conduct to address the problem or issue?	
Participation	For each activity you identified above, who are you trying to reach?	
Inputs	What resources are needed to successfully complete each activity (time, talent, technology, information, money, community partnerships, etc.)?	
Short-Term Outcomes	What changes do you expect to see fairly immediately as a result of your activities (include time frame)?	
Intermediate Outcomes	What do you expect to follow from the short-term outcomes (include time frame — often by the end of the grant, or within 5 years)?	
Long-Term Outcomes	Long term (include time frame), what will be different if you are successful? Goals may be fair past the end of the evaluation and not necessarily measurable.	

Worksheet 2b. Create a Logic Model — Template. See Toolkit Slides 19–23 for more information.

Inputs	Outputs		Outcomes		
	Activities	Participation	Short-term	Intermediate	Long-term
What resources do we need? R1: R2: etc.	What are we going to do? (What activities or action items are planned?) A1: A2: etc.	Who are we trying to reach with our activities? P1: P2: etc.	What changes do we expect to see short-term [add time frame]? S1: S2: etc.	What changes to we expect to see in [add time frame]? I1: I2: etc.	What changes do we expect to see long-term [add time frame]? L1: L2: etc.

Impact

What is the ultimate goal for this program?

Worksheet 3. Create and Prioritize Evaluation Questions. See [Toolkit Slides 24–26]() for more information.

What do you and your partners need or want to know? (Write as questions.)	Map to logic model. (Refer to Worksheet 3b if creating in parallel, not sequentially.)	Who would be interested in this information? (Refer to Worksheet 1.)	How will the information be used?	Prioritize questions Scale: 3=High 2=Medium 1=Low	
				Usefulness to support decisionmaking, etc.	Feasible to measure/ track at this stage of implementation
Example: To what extent is the program improving health outcomes?	L2	Investors Implementing partners	Determine future investments	3	3

Adapted from: *Building Capacity in Evaluating Outcomes: A Teaching and Facilitating Resources for Community-based Programs and* Organizations, University of Wisconsin-Extension, 2008.

Worksheet 4a. Identify Measures, Data Sources, and Data Collection Methods. See Toolkit Slides 31–33 for more information.

Referring to Worksheet 2, complete the first column (evaluation questions) with the ones you've decided to include in the evaluation. Develop a list of measures and then determine where or from whom you will get the information (data source) and how you will collect the information (data collection method).

Evaluation Questions (from Worksheet 2)	Measure(s)	Data Source	Data Collection Method	Frequency and Timing
Example: To what extent is the program improving health outcomes?	a. Blood pressure control before and after participation b. Participant perception of changes in health status	a. Electronic health record b. Patients	a. Data export / doc review b. Interviews	a. Quarterly data pulls b. 3 mo. post-program interview
1.	a. b. c.	a. b. c.	a. b. c.	a. b. c.
2.	a. b. c.	a. b. c.	a. b. c.	a. b. c.

Worksheet 4b. Identify Data Specifications. See Toolkit Slides 38–39 for more information.

For your quantitative data coming from existing systems, you will need to develop a data specifications table to articulate the specific data elements that you will need to pull for the evaluation.

Domain	Category	Quantitative Variable	Data Source	Variable Name	Description of Variable	Frequency/Timing of Data Collection	Notes on Inclusion/ Exclusion
Example: Health and demographics	Birthing person	Gestational diabetes (GD)	Electronic health record	DMGest	Checkbox yes	One-time data pull at the end of the study period	Every pregnant person who gave birth between XX and YY date, with a dx of GD
Example: Health and demographics	Baby	Birth weight	Electronic health record	Birthwt	Numeric — kg	One-time data pull at the end of the study period	Every baby born between XX and YY date

Worksheet 5. Determine the Best Study Design. See Toolkit Slides 40–45 for more information.

Consideration	Approach	Description/Comments (Open Ended)
Sample Size	[Insert total number of people in your sample, and how many you will be aiming to reach.]	
Segmentation Required (or Specific Subpopulations of Focus)	[Specify subpopulations of focus and/or variables that you want to segment by.]	
Approach to Comparison Groups	Check all that apply: □ Internal comparison — change over time □ Internal comparison — dose/response □ Internal comparison — staggered start date □ External comparison (specify approach in comments) □ Other, please explain in comments	
Timing of the Evaluation Relative to the Intervention	Check all that apply: □ Beginning (before / at the beginning of the intervention) □ During (throughout the pilot or phase of implementation) □ After (after the intervention has ended, retrospectively)	
Data Availability	□ Prospective (ongoing) □ Prospective (at set points in time) □ Retrospective	
Equity Considerations (Informed by Evaluation Discussion Guide)	[Describe how you are addressing equity in your evaluation plan.]	

Worksheet 6. Document Data Analysis and Interpretation Plan. See Toolkit Slides 48-49 for more information.

After you have determined your study design, you need to document how you will organize and analyze data.

Evaluation Question	Data Type	Analysis Proposed	Output Initial Ideas
What services are patients utilizing? Are there differences in utilization by engagement? Demographics?	EHR utilization data	Per member, over time period XX to YY: • Rate of emergency department utilization and hospitalization • Rate of primary care utilization and specialty medical services utilization Utilization trends by length of engagement in program (utilization before engagement, at three months, six months) and by patient characteristics	Excel tables Graphs of utilization trends and Excel tables

Worksheet 7. Develop Project Budget. See [Toolkit Slides 58-60] for more information.

Budget Item	Budget	Considerations
Direct Costs (Examples)		
Staff Time (Salaries and Benefits)	$	• Budget for all staff that need to engage, including leaders, project managers, analysts. • Consider how your staff are paid (e.g., charge to specific accounts or projects, or paid from administrative funds). For administratively funded staff, you will still need commitment for their time from leaders. • Include time for project management, coordination, and meetings in addition to project-specific activities. • Might need to include time and other resources for your partners' engagement, capacity building, technical assistance, etc., depending on their time, other resources, and expertise.
Consultant Time	$	• Consider additional capacity you would need to hire externally. • Identify the scope and hours for any consultants.
Transcription	$	• For primary qualitative data collection, transcriptionist services might be needed to help document notes from interview or focus group recordings
Incentives	$	• Consider paying people for their time to participate in evaluation activities. This is particularly important for patients, health plan members, and community members.
Translation and Interpretation	$	• Depending on the languages spoken in your target population, document translation or interpreter support may be needed.
Other Data Collection Expenses	$	• You may need access to additional platforms, software, data, etc., to conduct your evaluation (e.g., survey platforms, data analysis tools, and virtual meeting platforms).
Travel Expenses	$	• There may be expenses related to travel for evaluation meetings or data collection or both. • Mileage reimbursement, food allowances, etc., are also potentially needed
In-Person Meeting Expenses	$	• If conducting meetings or data collection in person, consider costs associated with hosting in-person meetings (e.g., food, space, parking, childcare).
Communications and Dissemination	$	• You may have additional expenses related to creating products, promoting evaluation results, publishing findings, etc.
Indirect Costs		
Overhead Internal Costs	$	• Often indirect costs are added onto budgets as a percentage of direct costs. Some funders cap the allowable indirect rate, so you will need to consult with them to determine this amount.
TOTAL	$	Sum of all lines above

Worksheet 8. Develop Evaluation Timeline. See Toolkit Slides 58-60 for more information.

Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Coordination with Evaluation Workgroup															
Evaluation Planning															
Logic Model Development															
Evaluation Planning															
IRB and Data Sharing Agreements															
Program Familiarization and Document Review															
Secondary Data Collection and Analysis															
Define Metrics and Data Specs															
Initial Data Pull, Including Merging Data															
Validate and Refine Data Pulls															
Midpoint Data Pull, Including Cleaning and Merging Data															
Midpoint Analysis															
Final Data Pull, Including Cleaning and Merging Data															
Final Analysis															
Primary Data Collection (e.g., Interviews) and Analysis															
Develop, Test, Refine Interview Protocols															
Recruit Potential Interviewees															
Conduct Interviews															
Qualitative Analysis (Coding, Theming)															
[Add additional rows as needed, for surveys, etc.]															
Synthesis and Reporting															
Data Integration and Synthesis Across Methods															
Interim Report															
Final Report															
Presentations to Key Partners															
Manuscript Submissions															

Worksheet 9. Disseminate Results to Key Partners. See Toolkit Slides 61—63 for more information.

Who? (See Worksheet 1.)	**What information do you need to share with them?**	**Why?**	**How will you share the information** (e.g., report, presentation, personal discussion, media release)?	**When should the information be shared?**
Example: Investors	Progress toward goals	To inform future investments	Written and oral report at regular meetings	Quarterly

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