Health Systems Tech Partnership Evaluation Checklist

Tech start-ups should consider mixed-method evaluations to:

- **Improve program planning or implementation:** Give teams a better sense of what's working and not, and why
- **Ensure accountability:** Be accountable to investors by understanding what's working, finding out if your product is having the desired results, and being able to explain the how and why behind the results you are seeing
- **Demonstrate achievement:** Prove your ability to deliver personal, clinical and financial outcomes
- **Strengthen marketing materials:** Utilize evaluation data to clarify value proposition, customer satisfaction and potential outcomes
- **Contribute to fundraising, sales & grant writing:** Drive revenue (volume and price) by proving effectiveness
- **Inform the field:** Contribute to academic research, provide tools and methods to help improve health care access and quality in your field by making fundings available for others to learn from

This checklist provides a high-level overview of key considerations for evaluation

Part 1: Knowing when to evaluate and establishing your evaluation vision

Step/Domain	Key Considerations
Determine readiness for an evaluation	- Is your product still being prototyped or is it established and "stable"? - Is the product "off the shelf" implementation or is significant customization part of the plan, and how might that impact an evaluation? - Are you currently going through significant growth/expansion? - Are you still working on an initial launch? How long have end users had access to it? - Are customers actively using it? In what settings/what scale? - Do you have enough implementation time/data to answer evaluation questions?
Decide if it is currently feasible to implement an evaluation	- Has evaluation funding been agreed on? - Will the evaluation be conducted internally and/or externally? - Is there adequate staffing, capacity, and expertise to engage with evaluation? - Is reach/engagement sufficient to enable an evaluation? - Does the timeline for evaluation align with when results are needed to inform key decisions? - Are there external changes to leadership, policy, the marketplace that will impact the evaluation?
Consider environmental and conceptual factors	- How does cultural context affect how the product was designed/implemented? - What unconscious biases might be affecting perceptions of who will be reached, how they will utilize the product, and/or what their outcomes will be? - What community-level cultural differences might impact implementation/evaluation? - What are potential unintended consequences/impacts of implementation? - How might current policies and the environment affect implementation/impact? - How might existing programs/investments affect implementation/impact?
Assess if you have the partnerships needed for evaluation	- Are all partners aligned on the vision/goals and value proposition for the evaluation? If not, how will you negotiate competing evaluation priorities across partner organizations? - Are partners willing to share data and engage with transparent evaluation? - Do partners agree on how information and outcomes will be used and who they will be shared with? How will neutral or negative results be shared? - How will decisions about the evaluation be made? Are partners aligned on accountability and decision making?
Do you have an agreed upon vision for the evaluation?	- Do key partners agree on the key components of the product/intervention to design a clear logic model that articulates what activities lead to the intended outcomes? Do you have agreement on key outcomes of interest and other targets? - Is there agreement on what you want to learn from the evaluation (i.e., evaluation questions)? - Have you considered what you might want to learn about implementation in order to better understand how things are working and how activities lead to intended outcomes? - Are you explicitly asking about disparities and gaps and how your product addresses them?

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Part 2: Identify evaluation measures and design

Step/Domain	Key Considerations
Identify measures and sources	• Given your evaluation questions, can you identify what data/measures you need to answer them? • Is reach, engagement, each outcome clearly defined and measurable? • For each measure, how will you collect that data and how often?
Determine what data is available and feasible to collect	• What are your primary data sources? What mix of quantitative and qualitative data will you use? How will multiple data sources be integrated to tell a cohesive story? • What data do you need from each partner? Is the data available and easily extracted and merged? • What segmentation of data will be needed to understand impact on populations of focus? • Can reach, engagement, and impact be measured in a way that allows us to look at what worked, for whom, and when, and whether there is a differential impact? • How will you monitor and capture unintended impact/consequences?
Identify data collection methods	• Who will be responsible for collecting data? • Do you have a data management system and a data sharing system for existing data from partner organizations? • What protocols do you need for primary data collection? How will they be developed? Who needs to review and vet the protocols?
Determine the appropriate evaluation design	• What design best aligns with your goals and your evaluation questions? • Is the best design feasible, given resources, timing, and data availability? • What evaluation design is needed for the story's credibility (comparisons, longitudinal etc.)? • What are key equity considerations that might impact your design?

Part 3: Operationalize the evaluation plan

Step/Domain	Key Considerations
Implement the evaluation	• Timing: When do you expect the product to be fully implemented? When could you start seeing outcomes? How long of a study period do you need? • Budget: What will it cost to do the evaluation and how will you revisit if the scope changes? • Data sharing/matching: What will be the processes and timing for data exchanges? How will data from multiple systems be matched and merged? • What feedback loops need to be established? How will you know if/when a pivot is needed?
Plan for staffing	• Is any external evaluation support needed? • Does each partner have capacity internally to engage in evaluation, including planning, data collection and analysis, interpretation, and dissemination? • Can staff accomplish needed evaluation activities within the expected timeline?
Establish needed agreements	• What Memorandum of Understandings/other contracts are needed for the evaluation? • What data sharing and data use agreements will be needed? Who will own the data? • Will you and/or your partners need approval from a human subjects review board? • How will you ensure HIPAA compliance at all stages of the evaluation/reporting? • How will data be transferred securely between organizations?
Disseminate results	• Who makes decisions about what is disseminated internally and externally? • Who will vet results before dissemination? • Who needs access to the results and by when? What decisions might these results inform? • What findings, if any, will be disseminated back to those who participated in the evaluation and/or are impacted by the intervention? • What data or learnings might be beneficial to share through peer-reviewed publications?
Consider when to pivot	• What evaluation findings might lead to a change in implementation (and possibly evaluation)? • What changes to implementation might impact the evaluation questions, metrics, etc.? • What policy, systems, or other environmental context changes might affect the evaluation? • How might new partners or changes to partner priorities affect the evaluation? • Who needs to be involved in making decisions on when and how to pivot?

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