

# Bedlam Evaluability and Evaluation Project Planning Checklist

**Name of Clinic:**

**Program Element:**

## **Purpose of Checklist**

To facilitate design and implementation of effective Bedlam evaluations, the checklist aids evaluators and evaluation clients in the process of

1. Focusing an evaluation
2. Making preliminary design decisions
3. Plan for utilization and dissemination of evaluation findings
4. Reflect on evaluation resources and infrastructure
5. Anticipate meta-evaluation
6. Troubleshoot issues

## **Focusing the Evaluation**

**Description of Object of Evaluation**

<b>Group</b>	<b>Internal</b>	<b>External</b>
<b>Client</b>		
<b>Users</b>		
<b>Audiences</b>		

**Aim of Evaluation:**

1.  **Accountability**
2.  **Continuous Improvement**
3.  **Enlightenment and Insight**
4.  **Diffusion of Innovation/Transfer of Practice**
5.  **Other**

**Timeframe for Sequence of Evaluation Project**

<b>Stages of Evaluation</b>	<b>Deliverable</b>	<b>Timeframe</b>
<b>Pre-evaluation assessment</b>		
<b>Evaluability assessment</b>		
<b>Evaluation strategy</b>		
<b>Evaluation contract</b>		
<b>Implementation of strategy</b>		
<b>Final report</b>		
<b>Audit and meta-evaluation</b>		

**Principal Evaluation Question:**

**Principal Evaluation Objective:**

**Utilization Objectives:**

**Dissemination Objectives:**

**Type of Information Sought about Bedlam**

1. \_\_\_\_ *Context of Clinic*
  - a. Policy
  - b. Community
  - c. Population
  - d. Interorganizational
  
2. \_\_\_\_ *Key Inputs*
  - a. Personnel
  - b. Physical sites
  - c. Internal configurations of service models
  - d. Infusion of technology
  
3. \_\_\_\_ *Process & Implementation*
  - a. Process of care
  - b. Process of transdisciplinary practice
  - c. Process of collaboration
  - d. Implementation analysis
  - e. Management process
  - f. Implementation effectiveness
  
4. \_\_\_\_ *Output/Product*
  - a. Curriculum innovation and products
  - b. Training innovation and products
  - c. Effort and amount of service
  - d. Innovations in health promotion products
  
5. \_\_\_\_ *Outcome*
  - a. Intentional
  - b. Unintentional

6. \_\_\_ **Effects**

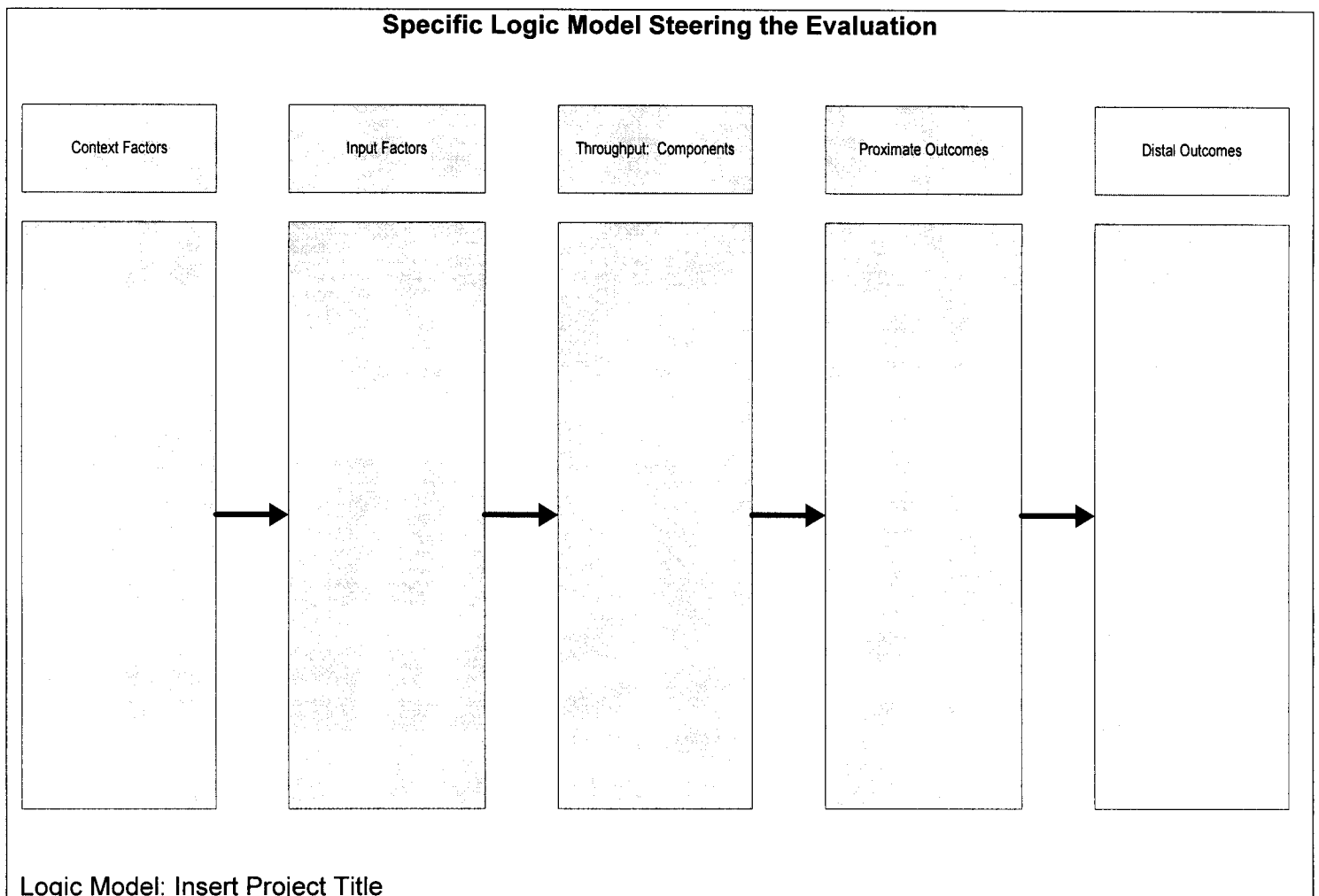
- a. Patient-level
- b. Clinic-level
- c. Community-level

7. \_\_\_ **Impact**

- a. Impact on health
- b. Impact on population
- c. Impact on community
- d. Impact on health system
- e. Impact on health policy

8. \_\_\_ **Output/Product**

- a. Adoption of external best practices
- b. Formulation of internal best practices



## Logic Narrative

**Context:**

**Input:**

**Components:**

**Proximate Outcomes:**

**Distal Outcomes:**

### Preliminary Design and Method Decisions

**Evaluation Design Considerations:**

1. \_\_\_\_\_ Responsive
2. \_\_\_\_\_ Empowerment
3. \_\_\_\_\_ Participatory

4. \_\_\_\_\_ Objectives-Based/Goal-Oriented
5. \_\_\_\_\_ Goal free
6. \_\_\_\_\_ Adversarial
7. \_\_\_\_\_ Other

#### Incorporation of Unstructured Methods into Evaluation

<b>Data Collection Methods</b>	<b>Application within Bedlam Evaluation Project</b>
<b>Ethnographic survey</b>	
<b>Unstructured interviewing</b>	
<b>Observation</b>	
<b>Participation</b>	
<b>Exploratory focus groups</b>	
<b>Narrative construction</b>	
<b>Other</b>	

#### Incorporation of Structured Methods into Evaluation

<b>Data Collection Methods</b>	<b>Application within Bedlam Evaluation Project</b>
<b>Structured survey</b>	
<b>Established instruments</b>	
<b>Structured interviews</b>	
<b>Secondary data analysis</b>	
<b>Structured observation</b>	
<b>Structured content analysis</b>	
<b>Structured focus groups</b>	
<b>Unobtrusive measures</b>	
<b>EMR</b>	
<b>Checklists</b>	
<b>Other</b>	

## Sampling Strategies

## Potential Data Sources

1. \_\_\_\_\_ Archives and documents
2. \_\_\_\_\_ Case records
3. \_\_\_\_\_ Data bases
4. \_\_\_\_\_ Recipients
5. \_\_\_\_\_ Families of recipients
6. \_\_\_\_\_ Members of community/neighborhoods
7. \_\_\_\_\_ Members of host settings [e.g., schools, public housing]
8. \_\_\_\_\_ Bedlam clinical staff/personnel
9. \_\_\_\_\_ Bedlam administrators and leaders
10. \_\_\_\_\_ Bedlam students
11. \_\_\_\_\_ Bedlam investors and funders
12. \_\_\_\_\_ Other Bedlam stakeholders

## Data Analytic Strategies

**Data Interpretation Strategies:**

**1. Scope of Involvement**

--

**2. Approach to Interpretation**

--

**Utilization and Dissemination Plan**

**Description of Utilization Needs by Client, Users, and Audiences**

<b>Group</b>	<b>Utilization Needs</b>
Client	
Users	
Audiences	

**Strategies to Fulfill Utilization Needs**

<b>Identification of Specific Strategies</b>	<b>Incorporation of Strategy into Project</b>

## Utilization Methods

<b>Utilization Methods</b>	<b>Incorporation into Project</b>
<b>Presentation and awareness building</b>	
<b>Training in use of evaluation findings</b>	
<b>Technical assistance and consultation</b>	
<b>Incorporation of evaluation findings into pre-service and in-service curricula</b>	
<b>Continued evaluation of utilization</b>	

## Dissemination

<b>Dissemination Activity</b>	<b>Incorporation into Project</b>
<b>Milestone reporting</b>	
<b>Final report</b>	
<b>Workshop and posters</b>	
<b>Web-based dissemination</b>	
<b>E-mail, pod casting and net casting</b>	
<b>Conference papers and workshops</b>	
<b>Presentation to client, audiences, and users</b>	
<b>Journal papers</b>	
<b>Dissemination at clinical and program sites</b>	
<b>Dissemination through local and national media</b>	

## Evaluation Resources and Infrastructure

Need for:

1. Evaluation budget
2. Team composition
3. Equipment and technology
4. Software
5. Analytic resources
6. Specialized Consultation

## Meta-Evaluation

Criteria for Assessing Quality of Evaluation

Fulfillment of contract	Yes	No
Propriety		
Accuracy		
Utility		
Effectiveness of utilization		
Effectiveness of dissemination		
Quality of final report		
Timeliness		
Impact of evaluation		

## Troubleshooting Issues

Issue	Management of Issue within Project
Use of EMR within site	
Quality of existing data bases	
Incorporation of data collection methods into care process	
Integration of evaluation into site	
Differential evaluation by type of clinic	
Interface of evaluation with other evaluations [e.g. school based ones]	
Impact of specific evaluation on evaluation capacity building	
Utilization of specific evaluations	

