

Project Evaluation Plan Samples

Rural Health Network Development Program Technical Assistance

January 2018



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This is a publication of Rural Health Innovations, LLC (RHI), a subsidiary of the National Rural Health Resource Center. The Technical Assistance for Network Grantees Project is supported by Contract Number HSH250201400024C from the U.S. Department of Health and Human Services, Health Resources and Services Administration, Federal Office of Rural Health Policy.

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Background and Purpose

Rural Health Innovations (RHI), LLC, is a subsidiary of the National Rural Health Resource Center (The Center), a non-profit organization. Together, RHI and The Center are the nation's leading technical assistance and knowledge center in rural health. In partnership with The Center, RHI enhances the health of rural communities by providing products and services with a focus on excellence and innovation. RHI is providing technical assistance (TA) to the Rural Health Network Development grantees through a contract with the Federal Office of Rural Health Policy (FORHP).

Evaluation of grant funded programs is critical to both the success and sustainability of the project. It is critical to assess impact of the project objectives to demonstrate value, monitor progress toward project goals, and to identify potential best practices and lessons learned. Evaluation results are then used to improve project performance.

This Project Evaluation Plan Sample is part of the Evaluation Plan Toolkit and is designed to support the associated Evaluation Plan Guide and Evaluation Plan Template. This toolkit is supported with an educational webinar: [Program Evaluation Plan Toolkit](#).

The purpose of the Evaluation Plan Toolkit is to support writing a project evaluation plan. Although the Evaluation Plan Template is not required as part of the grant deliverable, the following components are recommended:

1. **Project Snapshot:** Setting context for the evaluation plan including program mission, vision, list of program goals, strategic objectives, network history and members, and partners.
2. **Plan to Measure Key Data:** Selecting key process and outcome data while identifying specific and defined measurements.
3. **Collecting and Reporting Results:** Using the plan to measure the key data, create tables to gather and report program progress and impact.
 - a. Evaluation Results Scorecard
 - b. Dashboard for Key Measures
4. **Communication Plan for Key Results:** Intentionally and purposefully sharing evaluation results with members, partners, community and funders that demonstrates success and value.

PROJECT SNAPSHOT SAMPLE

Project Snapshot	
Network Vision: Increase and improve healthcare access for all low income, uninsured, underinsured residents, documented and undocumented of rural citizens in our catchment area.	
Project Goal 1: Expand existing Network to include stakeholders and influential agencies, organizations and individuals in the field of public health and CHWs.	
Strategic Objectives	Key Initiatives (6-18 month activities)
1. By the end of Year 1, the Network will have at least 20 new partners, with a special emphasis on engaging Federally Qualified Health Centers (FQHCs) in a 32-county service region.	1. Establish a workgroup for membership growth.
	2. Potential new member list created.
	3. Workgroup establishes plan to recruit new members.
2. By the end of Year 2, the Network will have grown by at least 20%, with a special emphasis on engaging medical providers and healthcare systems.	1. Workgroup on membership growth continues work.
	2. Potential new member list created.
	3. Workgroup works the established plan to recruit new members.
3. By the project's end, the Network will have grown by an additional 20% since Year 2, with a special emphasis on engaging those in public health, including local health departments and research organizations.	1. Workgroup on membership growth continues work.
	2. Potential new member list created.
	3. Workgroup works the established plan to recruit new members.

Project Goal 2: Assist in the establishment and development of a statewide CHW curriculum.	
Strategic Objectives	Key Initiatives (6–18 month activities)
1. The Network will provide partial funding for a half FTE to serve as the statewide CHW coordinator at the County Department of Public Health by the end of Year 1.	1. Develop a job description.
	2. Find the appropriate fit for the job.
	3. Begin work as statewide CHW coordinator.
2. The Network will establish two Mental Health First Aid Master Trainers and two Chronic Disease Self-Management Program Master Trainers in each year of the project, for a total of six Mental Health First Aid Master Trainers and six Chronic Disease Self-Management Program Master Trainers.	1. Discover training dates and locations.
	2. Recruit persons to be trained.
	3. Persons attend training.
3. The Network will increase awareness among trained and student CHWs by providing specialized programs and training about underserved populations, including Hispanics and low-income citizens.	1. Research available curriculums in cultural sensitivity.
	2. Chose curriculum to use or develop curriculum.
	3. Implement curriculum.
Project Goal 3: Establish certification and reimbursement for CHWs and their services.	
Strategic Objectives	Key Initiatives (6–18 month activities)
1. Network will develop a detailed communication plan for the results and outcomes of the evaluation.	1. Assemble a communications committee.
	2. Develop an evaluation plan for assessing CHW outcomes.
	3. Design a communication plan that includes the results are to be communicated and how to communicate those results.
2. Network will disseminate results and outcomes of the evaluation according to the communication plan.	1. Collect measures.
	2. Update dashboard.
	3. Send out to key stakeholders as determined in communication plan.
3. By the project's end, a return on investment (ROI) will be completed to	1. Research methods of determining ROI.

show the economic impact of CHWs in our rural catchment area.	2. Establish a working group for establishing ROI.
	3. Develop a process to determine the ROI for CHWs in catchment area.
4. Network will establish a certification process for CHWs.	1. Develop a certification committee.
	2. Committee begins meeting regularly to determine a plan for the process that leads to certification.
	3. Implement the plan.
Project Goal 4: Increase the number of CHWs being utilized in our rural catchment area.	
Strategic Objectives	Key Initiatives (6–18 month activities)
1. The CHW Training Centers will maintain a 90% retention rate of students.	1. Implement the training curriculum for CHW's.
	2. Do a quarterly satisfaction evaluation.
	3. Establish and implement exit interview process.
2. Through the CHW Training Centers' job placement services, the Network will place 70% of graduates into jobs across a 32-county region.	1. Develop promotional materials to disseminate to potential employers.
	2. Develop a promotion / marketing plan to promote CHW's to potential employers.
	3. Implement the marketing plan.
3. In the long-term, this project will encourage the replication of CHW programs, similar to the County Public Health Department CHW Programs, across the entire state.	1. Develop a workgroup to focus on documenting the process.
	2. Present at state conferences on the work being done.
	3. Network with state agencies that could encourage cross state implementation.

PLAN TO MEASURE KEY DATA SAMPLE

Strategic Objectives	What				When	Who
	Output or Outcome Measure Description	Target	Measure Definition	Data Collection Method	Data Collection Frequency	Person(s) Responsible for Data Gathering
Project Goal 1: Expand existing Network to include stakeholders and influential agencies, organizations and individuals in the field of public health and CHWs.						
1. By the end of Year 1, the Network will have at least 20 new partners, with a special emphasis on engaging Federally Qualified Health Centers (FQHCs) in a 32-county service region.	<ul style="list-style-type: none"> Number of new partners with emphasis on engaging FQHCs in the 32-county service region 	<ul style="list-style-type: none"> 20 new partners by Year-1 end 	<ul style="list-style-type: none"> Number of new network partners 	<ul style="list-style-type: none"> Tracked within Network partnership spreadsheet and mapping tools 	<ul style="list-style-type: none"> Annually 	<ul style="list-style-type: none"> Network Director
2. By the end of Year 2, the Network will have grown by at least 20%, with a special emphasis on engaging medical providers and healthcare systems.	<ul style="list-style-type: none"> Number of new partners with emphasis on medical providers and healthcare systems 	<ul style="list-style-type: none"> 20% by Year-2 end 	<ul style="list-style-type: none"> Number of new network partners since Year-1/total number of partners in Network as of Year 1 	<ul style="list-style-type: none"> Tracked within Network partnership spreadsheet and mapping tools 	<ul style="list-style-type: none"> Annually 	<ul style="list-style-type: none"> Network Director
3. By the project's end, the Network will have grown by an additional 20% since Year 2, with a special emphasis on engaging those in public health, including local health departments and research organizations.	<ul style="list-style-type: none"> Network growth with emphasis on public health, local health department and research organizations 	<ul style="list-style-type: none"> 20% by project's end 	<ul style="list-style-type: none"> Number of new network partners since Year 2/total number of partners in the Network as of Year-2 	<ul style="list-style-type: none"> Tracked within Network partnership spreadsheet and mapping tools 	<ul style="list-style-type: none"> Annually 	<ul style="list-style-type: none"> Network Director

Strategic Objectives	What				When	Who
	Output or Outcome Measure Description	Target	Measure Definition	Data Collection Method	Data Collection Frequency	Person(s) Responsible for Data Gathering
Project Goal 2: Assist in the establishment and development of a statewide CHW curriculum.						
1. The Network will provide partial funding for a half-time FTE to serve as the statewide CHW coordinator at the County Department of Public Health by the end of Year 1.	<ul style="list-style-type: none"> Half-time CHW Coordinators employed 	<ul style="list-style-type: none"> One half-time FTE 	<ul style="list-style-type: none"> Network Director to determine the amount needed to = ½ FTE for CHW Coordinator 	<ul style="list-style-type: none"> County Dept. of Public Health employment records 	<ul style="list-style-type: none"> Once; end of Year-1. 	<ul style="list-style-type: none"> Network Director County Department of Health
2. Network will establish 2 Mental Health First Aid Master Trainers and 2 Chronic Disease Self-Management Program Master Trainers in project year, for a total of 6 of each trainer type.	<ul style="list-style-type: none"> Become training site for Chronic Disease Self-Mgmt Program and Mental Health First Aid training Increased knowledge of CHWs using chronic disease mgnt tactics Enhanced collaboration among providers/partners for integrated mental health/primary care svcs 	<ul style="list-style-type: none"> 6 Mental Health First Aid Master Trainers by project end (2/yr) 6 Chronic Disease Self-Mgmt Master Trainers by project end (2/yr) 	<ul style="list-style-type: none"> Number of Master Trainers in Mental Health First Aid and Chronic Disease Self-Management Program 	<ul style="list-style-type: none"> Training certificates and workshop agendas 	<ul style="list-style-type: none"> Annually 	<ul style="list-style-type: none"> CHW Training Center Directors; Instructors/Trainers
3. Network will increase awareness of trained and student CHWs by providing specialized programs/training about underserved populations, including Hispanics and low-income citizens.	<ul style="list-style-type: none"> Increased number of students enrolled with, and graduated from the CHW Training Centers trained in cultural competency. 	<ul style="list-style-type: none"> Not yet determined 	<ul style="list-style-type: none"> Number of specialized programs and training delivered to CHWs each year including cultural competency. 	<ul style="list-style-type: none"> CHW Training Center student enrollment and graduation data reports 	<ul style="list-style-type: none"> Annually 	<ul style="list-style-type: none"> CHW Training Center Directors; Instructors/Trainers

Strategic Objectives	What				When	Who
	Output or Outcome Measure Description	Target	Measure Definition	Data Collection Method	Data Collection Frequency	Person(s) Responsible for Data Gathering
Project Goal 3: Establish certification and reimbursement for CHWs and their services.						
1. Network will develop a detailed communication plan for the results and outcomes of the evaluation.	<ul style="list-style-type: none"> Detailed communication plan 	<ul style="list-style-type: none"> One 	<ul style="list-style-type: none"> Detailed communication plan completion 	<ul style="list-style-type: none"> Network minutes and Network Director 	<ul style="list-style-type: none"> Once-Year-1 	<ul style="list-style-type: none"> Network Director
2. Network will disseminate results and outcomes of the evaluation according to the communication plan.	<ul style="list-style-type: none"> Evaluation Plan dissemination 	<ul style="list-style-type: none"> not yet determined 	<ul style="list-style-type: none"> Number of reports, presentations, and publications disseminated using local, state and nat'l venues 	<ul style="list-style-type: none"> Evaluation results; communication plan 	<ul style="list-style-type: none"> Quarterly 	<ul style="list-style-type: none"> Network Director; Network Partners; Evaluation Team
3. By the project's end, a return on investment (ROI) will be completed to show the economic impact of CHWs in our rural catchment area.	<ul style="list-style-type: none"> Conduct a ROI to the economic impact of the CHWs 	<ul style="list-style-type: none"> Amount saved 	<ul style="list-style-type: none"> Economic impact of the utilization of CHWs calculated by an ROI 	<ul style="list-style-type: none"> Use of ROI tools 	<ul style="list-style-type: none"> Once-- at project's end 	<ul style="list-style-type: none"> Independent evaluator
4. Network will establish through the Cabinet for Health and Family Services Department for Medicaid Services, a certification process for CHWs.	<ul style="list-style-type: none"> Establish a CHW certification process 	<ul style="list-style-type: none"> Process established 	<ul style="list-style-type: none"> CHW certification process will be discussed during Network meetings and recorded in the Network meeting minutes. 	<ul style="list-style-type: none"> Reporting of workgroup works and annual report. 	<ul style="list-style-type: none"> Once-- Project's end 	<ul style="list-style-type: none"> Network Director; Network Partners, CHW Workgroup; CHW Training Center Directors; CHW Program Director

Strategic Objectives	What				When	Who
	Output or Outcome Measure Description	Target	Measure Definition	Data Collection Method	Data Collection Frequency	Person(s) Responsible for Data Gathering
Project Goal 4: Increase the number of CHWs being utilized in our rural catchment area.						
1. The CHW Training Centers will maintain a 90% retention rate of students.	<ul style="list-style-type: none"> Maintain retention rate of all students 	<ul style="list-style-type: none"> 90% 	<ul style="list-style-type: none"> Number of graduates of the CHW Training Centers/total number of students enrolled at the CHW Training Centers 	<ul style="list-style-type: none"> CHW Training Center enrollment and graduation data reports 	Annually	CHW Training Center Directors; Instructors/Trainers
2. Through the CHW Training Centers' job placement services, the Network will place 70% of graduates into jobs across a 32-county region.	<ul style="list-style-type: none"> Place graduates into jobs across a 32-county region 	<ul style="list-style-type: none"> 70% 	<ul style="list-style-type: none"> Number of graduates of the CHW Training Centers placed in CHW positions/total number of graduates of the CHW Training Centers 	<ul style="list-style-type: none"> Student enrollment and graduation data reports 	Annually	CHW Training Center Directors; Instructors/Trainers
3. In the long-term, this project will encourage the replication of CHW programs, similar to the County Public Health Department CHW Programs, across the entire state.	<ul style="list-style-type: none"> Encourage the replication of CHW programs 	<ul style="list-style-type: none"> Replicated programs 	<ul style="list-style-type: none"> Number of replicated CHW programs in the state 	<ul style="list-style-type: none"> Network mapping tools 	Annually	Training Center Director;

EVALUATION RESULTS SCORECARD SAMPLE

Strategic Objectives	What		When	Results				
	Output or Outcome Measure Description	Target	Frequency	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Annual
Project Goal 1: Expand existing Network to include stakeholders and influential agencies, organizations and individuals in the field of public health and community health workers.								
1. By the end of Year 1, the Network will have at least 20 new partners, with a special emphasis on engaging Federally Qualified Health Centers (FQHCs) in a 32-county service region.	<ul style="list-style-type: none"> Number of new partners with emphasis on engaging FQHCs in the 32-county service region 	• 20	• Annually					
2. By the end of Year 2, the Network will have grown by at least 20%, with a special emphasis on engaging medical providers and healthcare systems.	<ul style="list-style-type: none"> Number of new partners with emphasis on medical providers and healthcare systems 	• 20%	• Annually					
3. By the project's end, the Network will have grown by an additional 20% since Year 2, with a special emphasis on engaging those in public health, including local health departments and research organizations.	<ul style="list-style-type: none"> Network growth with emphasis on public health, local health department and research organizations 	• 20%	• Annually					

Strategic Objectives	What		When	Results				
	Output or Outcome Measure Description	Target	Frequency	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Annual
Project Goal 2: Assist in the establishment and development of a statewide CHW curriculum.								
1. The Network will provide partial funding for a half-time FTE to serve as the statewide CHW coordinator at the County Department of Public Health by the end of Year 1.	<ul style="list-style-type: none"> Half-time CHW Coordinators employed 	<ul style="list-style-type: none"> One half-time FTE 	<ul style="list-style-type: none"> Once-- end of Year-1 					
2. Network will establish 2 Mental Health First Aid Master Trainers and 2 Chronic Disease Self-Management Program Master Trainers in project year, for a total of 6 of each trainer type.	<ul style="list-style-type: none"> Become training site for the Chronic Disease Self-Management Program and the Mental Health First Aid training Increased knowledge of CHWs using chronic disease management tactics Increased self-efficacy to manage chronic disease Improvement in client's health status Enhanced collaboration among providers/partners for integrated mental health/primary care services 	<ul style="list-style-type: none"> Six Mental Health First Aid Master Trainers by project end (2/yr) Six Chronic Disease Self-Management Master Trainers by project end (2/yr) 	<ul style="list-style-type: none"> Annually 					
3. Network will increase awareness of trained and student CHWs by providing specialized programs/training about underserved populations, including Hispanics and low-income citizens.	<ul style="list-style-type: none"> Increased number of students enrolled with, and graduated from the CHW Training Centers 	<ul style="list-style-type: none"> Not yet determined 	<ul style="list-style-type: none"> Annually 					

Strategic Objectives	What		When	Results				
	Output or Outcome Measure Description	Target	Frequency	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Annual
Project Goal 3: Establish certification and reimbursement for CHWs and their services.								
1. Network will develop a detailed communication plan for the results and outcomes of the evaluation.	<ul style="list-style-type: none"> Detailed communication plan 	<ul style="list-style-type: none"> One 	<ul style="list-style-type: none"> Once--Year-1 					
2. Network will disseminate results and outcomes of the evaluation according to the communication plan.	<ul style="list-style-type: none"> Evaluation Plan dissemination 	<ul style="list-style-type: none"> Not yet determined 	<ul style="list-style-type: none"> Quarterly 					
3. By the project's end, a return on investment (ROI) will be completed to show the economic impact of CHWs in our rural catchment area.	<ul style="list-style-type: none"> Conduct a ROI to the economic impact of the CHWs 	<ul style="list-style-type: none"> Amount saved 	<ul style="list-style-type: none"> Once--at project's end 					
4. Network will establish through the Cabinet for Health and Family Services Department for Medicaid Services, a certification process for CHWs.	<ul style="list-style-type: none"> Establish a CHW certification process 	<ul style="list-style-type: none"> Actual result 	<ul style="list-style-type: none"> Once--at project's end 					

Strategic Objectives	What		When	Results				
	Output or Outcome Measure Description	Target	Frequency	Qtr. 1	Qtr. 2	Qtr. 3	Qtr. 4	Annual
Project Goal 4: Increase the number of CHWs being utilized in our rural catchment area.								
1. The CHW Training Centers will maintain a 90% retention rate of students.	<ul style="list-style-type: none"> Maintain retention rate of all students 	<ul style="list-style-type: none"> 90% 	<ul style="list-style-type: none"> Annually 					
2. Through the CHW Training Centers' job placement services, the Network will place 70% of graduates into jobs across a 32-county region.	<ul style="list-style-type: none"> Place graduates into jobs across a 32-county region 	<ul style="list-style-type: none"> 70% 	<ul style="list-style-type: none"> Annually 					
3. In the long-term, this project will encourage the replication of CHW programs, similar to the County Public Health Department CHW Programs, across the entire state.	<ul style="list-style-type: none"> Encourage the replication of CHW programs 	<ul style="list-style-type: none"> Replicated programs 	<ul style="list-style-type: none"> Annually 					

DASHBOARD FOR KEY MEASURES SAMPLE

Output or Outcome Measure Description	Target	Frequency	Results				Trending
1. Number of new partners with emphasis on engaging FQHCs in the 32-county service region.	• 20	• Annually					
<p>Strategic Objective: By the end of Year-1, the Network will have at least 20 new partners, with a special emphasis on engaging FQHCs in a 32-county service region.</p> <p>Measure Definition: Number of new Network partners.</p> <p>Method of Tracking: Tracked within Network partnership spreadsheet and mapping tools.</p>							

Output or Outcome Measure Description	Target	Frequency	Results				Trending
1. Become a training site for the Chronic Disease Self-Management Program and the Mental Health First Aid training	• 6	• Annually					
<p>Strategic Objective: The Network will establish two Mental Health First Aid Master Trainers and two Chronic Disease Self-Management Program Master Trainers in each year of the project, for a total of six Mental Health First Aid Master Trainers and six Chronic Disease Self-Management Program Master trainers.</p> <p>Measure Definition: Number of Master Trainers in Mental Health First Aid and Chronic Disease Self-Management Program.</p> <p>Method of Tracking: Training certificates and workshop agendas.</p>							

Output or Outcome Measure Description	Target	Frequency	Results				Trending
1. Place graduates into jobs across a 32-county region.	• 70%	• Annually					
<p>Strategic Objective: Through the CHW Training Centers' job placement services, the Network will place 70% of graduates into jobs across a 32-county region.</p> <p>Measure Definition: Number of graduates of the CHW Training Centers placed in CHW positions/total number of graduates of the CHW Training Centers.</p> <p>Method of Tracking: CHW Training Center enrollment and graduation data reports.</p>							
2. Encourage the replication of CHW programs.	• Replicated programs	• Annually					
<p>Strategic Objective: In the long-term, the project will encourage the replication of CHW programs, similar to the County Health Department CHW programs, across the entire state.</p> <p>Measure Definition: Number of replicated CHW programs in the state.</p> <p>Method of Tracking: Network mapping tools.</p>							

COMMUNICATION PLAN FOR KEY RESULTS SAMPLE

Key Measure Description	Audience of Communication	Mode of Delivering Information	Frequency of Delivering Information	Person Responsible for Communication
1. Number of network members	<ul style="list-style-type: none"> Network members 	<ul style="list-style-type: none"> Dashboard, board meetings 	<ul style="list-style-type: none"> Bi-annually 	<ul style="list-style-type: none"> CHW Coordinator
2. CHW Graduate retention and placement	<ul style="list-style-type: none"> Network members and state partners 	<ul style="list-style-type: none"> Board meetings, dashboard, "newsletter" 	<ul style="list-style-type: none"> Annually 	<ul style="list-style-type: none"> CHW Training center director
3. Number of CHW's trained in specialized areas	<ul style="list-style-type: none"> Network members, CHW coordinator 	<ul style="list-style-type: none"> Monthly reports, dashboard, reports and board meetings 	<ul style="list-style-type: none"> Quarterly 	<ul style="list-style-type: none"> CHW Training center director
4. Establish certification process	<ul style="list-style-type: none"> Network members and state officials 	<ul style="list-style-type: none"> "Newsletter", intentional conversations 	<ul style="list-style-type: none"> Quarterly 	<ul style="list-style-type: none"> CHW Coordinator