

Moving beyond the evaluation plan: Telling the story of a complex program

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Professional Data Analysts (PDA) used a process to **move beyond a traditional evaluation plan** to develop a series of **evaluation deliverables** for the Indiana Department of Health Tobacco Prevention and Cessation (TPC), a complex and multi-faceted program with numerous partners. The deliverables **documented existing data and information sources** related to program components, **identified strengths and gaps** in current evaluation activities, and **provided recommendations** for current and future evaluations.

Introduction

TPC had a strong evaluation history, ongoing evaluation activities, and a new 5-year strategic plan when PDA was brought in as a new external comprehensive program evaluator. Because of that history, they needed more than a traditional evaluation plan to ensure the evaluation aligned with program strategies and focused on learning from findings and telling a complete story. We initiated a comprehensive approach to assess TPC's evaluation plan and provide tools and recommendations that would align with their revised strategic goals and learning objectives.

Methods

PDA used three key steps to better understand the program and develop strategic evaluation recommendations with TPC.

1. Document review and program mapping

- Reviewed TPC documents, CDC resources, external state tobacco control plans and evaluation reports
- Using Miro Board, facilitated a series of qualitative data collection sessions to document activities and partnerships

Example Miro Board



Priority Area 2: Increase the proportion of Hoosiers not exposed to secondhand smoke

Activities and partnerships



2. Identifying evaluation priorities

- Using Miro Board, facilitated two conversations with TPC about evaluation questions and priorities

3. Assessment process

- Using external resources and PDA's evaluation and topical expertise, documented TPC's evaluation strengths, opportunities, and recommendations
- Iteratively distilled the findings into a report
- Conducted an after-report survey with TPC to promote discussion around use of the recommendations

Key takeaways and next steps

- The approach allowed the evaluators and clients to align and document their understanding of the program and evolving needs.
- The tools helped guide the discussions and clarify unspoken assumptions.
- PDA identified a number of barriers to this approach:
 - Required significant time from clients
 - The full context of any program cannot be understood in a short period of time
- PDA and TPC identified a number of next steps following the report:
 - Plans to initiate some of the recommendations that were high on importance and feasibility
 - A follow up study to integrate community voices (see QR code)
 - Initiative of an evaluation advisory committee
 - Annual reassessment of strategic evaluation plan's alignment with current work and need to re-prioritize

Evaluation products

A program map outlined both program activities and the data sources related to them.

This document ensured PDA understood their current program and evaluation activities.

Program Map: Activities & Data Sources

Program Activities	Grantee report	Statewide youth survey	Statewide adult survey	State partner report	Health Department tracking	Facility report
Activity 1						
Activity 2						
Activity 3						
Activity 4						
Activity 5						

The evaluation report detailed the assessment of the current evaluation as well as opportunities, recommendations and next steps.

The report identified strengths, opportunities, and recommendations. The format below fit the TPC program and allowed for clear discussions:

Strategic Evaluation Plan Template

Overarching evaluation areas	
Opportunities	Recommendations
Ongoing evaluation areas	
Opportunities	Recommendations
Future evaluation areas	
Opportunities	Recommendations

Within the evaluation plan, we used icons to identify:

- Potential for high impact
- Programmatic priorities

The results of an after-report survey guided discussions around prioritizing next steps for evaluation activities.

After TPC leadership read the report, they completed a brief survey where they rated each evaluation recommendation on a scale of 1-5 (1=low, 5=high) for importance and feasibility.

Examples of Importance & Feasibility Survey Scores

Recommendation	Importance		Feasibility	
	Average	Range	Average	Range
Recommendation 1	4.50	4--5	3.75	3--4
Recommendation 2	4.40	4--5	3.80	3--5
Recommendation 3	3.80	3--5	3.40	2--4
Recommendation 4	3.00	2--4	1.80	1--2

Green: average importance score ≥ 4

Red: average feasibility score ≤ 3

Scan here to see AEA posters and presentations by PDA, including a poster about the second phase of evaluation planning.

