

What to think about when starting an evaluation

It is important to prepare for evaluation from the beginning of your project, thinking clearly about why you want to do an evaluation, what you want to learn from it, and how you (and others) will use it when it's finished.

Clarify purpose: Why are you doing an evaluation?

The majority of the work involved in making sure your evaluation is used and useful actually occurs in the preparation and planning stages of the evaluation, before any data are collected or report is written. The purpose of an evaluation should be grounded in how it will be *used* when it's finished. For example, *"To assess the extent to which promoting community resources for patients reduces visits to primary or secondary care and therefore whether it is worth investing in such community support"*.

Top tip:

It's important to agree who the evaluation is for at the outset, so that it can be designed to meet the needs of its intended audience. A GP practice delivering an initiative may be interested in answering different questions than a commissioner of services.

Decide objectives: What does success look like for the project?

Evaluation is all about testing whether projects have achieved their intended goals. So it's important to specify what success looks like for a project by having clearly defined objectives. The terms used in those objectives also need to be clearly defined, so that it's clear (for example) whether the objective is to demonstrate impact on activity, costs or savings (which has a knock on impact on the data required) or to share learning and understand replicability (which will require a very different approach).

Top tip:

Make objectives SMART (**S**pecific, **M**easurable, **A**chievable, **R**ealistic, **T**ime-bound), e.g. "Reduce GP visits for those who are referred onto the programme compared to matched control patients who are not referred over a 12 month period"

Create a logic model: How will your project achieve success?

Logic models sound complex and conceptual, but are in fact a simple, practical way to represent everything you need to know about an evaluation visually. They show what your project is trying to achieve and how you expect the activities you do (practical actions like advertising initiatives) to lead to outputs (things you can easily count, like participant numbers) and how these link to the outcomes you've established for the project (e.g. GP visits). They are also very useful tool for ensuring that all stakeholders are on the same page about both the project and the evaluation.

Define some evaluation questions: What do you want to learn?

If your evaluation has a clear purpose, the project has clear objectives and you have a logic model sketched, then evaluation questions should be easy to establish. Evaluation questions set out what you want to learn from an evaluation, such as *"What is the uptake of the new initiative? And What is the impact of uptake on subsequent gp visits??"*. As with project objectives, they should be SMART. Most importantly, answers to the complete list of evaluation question should satisfy the evaluation purpose and tell you whether your project objectives have been achieved.

Do you want to make this as painless as possible? Start early!

The best time to plan an evaluation is before the project has started. This gives you enough time to set up data collection mechanisms, and ensure that all stakeholders are agreed about what both the project and the evaluation are trying to achieve. Starting an evaluation mid-project (or even worse, at the end) always makes life more difficult, and leaves you wishing you'd started earlier.

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September 2016