



## QI Power Hour

### INTRODUCTION TO PROGRAM EVALUATION

With ALVIN YAPP



1

---

---

---

---

---

---

---

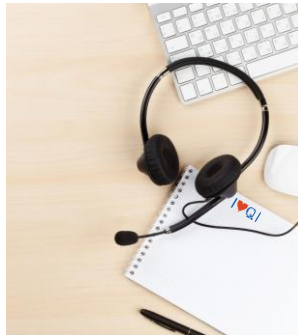
---

## Welcome to QI Power Hour

Connect to audio using **Audio Broadcast**:



? Do you have questions about connecting to audio? Use the **chat function** to message the Host, QI Power Hour, for assistance.



2

---

---

---

---

---

---

---

---



## QI Power Hour

### INTRODUCTION TO PROGRAM EVALUATION

With ALVIN YAPP



3

---

---

---

---

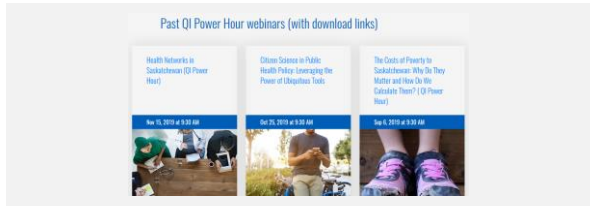
---

---

---

---

## Access past QI Power Hour sessions



[Visit our website to view past sessions!](#)

Connect to Audio using Audio Broadcast



5

---

---

---

---

---

---

---

---



Sign up for the QI Power Hour email newsletter

Receive notices about upcoming sessions and details on how to register straight to your in your inbox.

[Visit: bit.ly/hqc\\_subscribe](#)

Connect to Audio using Audio Broadcast



6

---

---

---

---

---

---

---

---

## Spread of QI Power Hour across SK



Connect to Audio using Audio Broadcast



7

---

---

---

---

---

---

---

---

# Spread of QI Power Hour across SK



Connect to Audio using Audio Broadcast



8

# Spread of QI Power Hour across SK



Connect to Audio using Audio Broadcast



9

# Spread of QI Power Hour across Canada



Connect to Audio using Audio Broadcast



10

## Spread of QI Power Hour across Canada



11 Connect to Audio using Audio Broadcast

11

## Spread of QI Power Hour across Canada



12 Connect to Audio using Audio Broadcast

12

## Spread of QI Power Hour worldwide



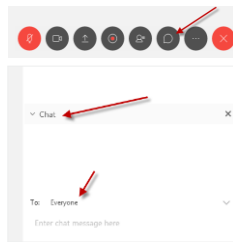
13 Connect to Audio using Audio Broadcast

13

## Webex tool: chat function

### Chat functions:

- Share **questions**, **comments**, and **ideas**
- Click on the message bubble icon to access the chat
- Send to **Everyone**



Connect to Audio using Audio Broadcast



14

14

---

---

---

---

---

---

---

---



## QI Power Hour

**INTRODUCTION TO  
PROGRAM EVALUATION**  
With ALVIN YAPP



15

---

---

---

---

---

---

---

---

## Intro to Program Evaluation

QI Power Hour May 20, 2022

16

---

---

---

---

---

---

---

---

HQC is situated on Treaty 6 Territory as agreed upon by Crown representatives and Cree, Assiniboiné, and Ojibwa leaders on August 23, 1876 at Fort Carlton, Saskatchewan, and on September 9, 1876 at Fort Pitt, Saskatchewan.

17

---

---

---

---

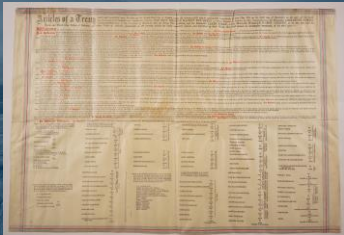
---

---

---

---

HQC is situated on Treaty 6 Territory as agreed upon by Crown representatives and Cree, Assiniboiné, and Ojibwa leaders on August 23, 1876 at Fort Carlton, Saskatchewan, and on September 9, 1876 at Fort Pitt, Saskatchewan.



18

---

---

---

---

---

---

---

---

The Indigenous peoples were disadvantaged during the signing of Treaty 6 because the document was only written in English; their interpreter needed to explain the words, meanings and concepts of the treaty text. Some miscommunications have been claimed since then:

- that the Crown didn't want to buy the land but instead borrow it
- that the Indigenous peoples could choose the amount of land they wanted to retain
- that the treaty would adapt to changing conditions; some believe that the treaty terms should be re-evaluated to better suit the needs of Indigenous people today

19

---

---

---

---

---

---

---

---

I acknowledge the trauma and suffering caused by the various governments and individuals of Canada who did not adhere to the provisions of Treaty 6, leading to famine, the withholding of supplies, and the kidnapping of children through residential schools.

I reaffirm my commitment to reconciliation and give thanks to the indigenous peoples for welcoming me to their land where I raise my family.

20

---

---

---

---

---

---

---

---

## Outline

- What is Evaluation?
  - How is it different from Research and Quality Improvement?
- Three approaches to Evaluation
  - Summative
  - Formative
  - Developmental
- Who an Evaluator is?
- How to conduct an evaluation?



21

---

---

---

---

---

---

---

---

## What is Evaluation?

22

---

---

---

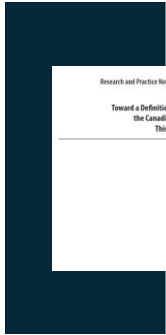
---

---

---

---

---



23

## What is Evaluation?

---

---

---

---

---

---

---

---



24

## What is Evaluation?

From Poth, et al. (2014):  
No single definition exists among evaluators and a single definition may not even be desirable; it is a diverse and complex field.

---

---

---

---

---

---

---

---



25

## What is Evaluation?

From Poth, et al. (2014):  
No single definition exists among evaluators and a single definition may not even be desirable; it is a diverse and complex field.

From Canadian Evaluation Society:  
Evaluation is the systematic assessment of the design, implementation or results of an initiative for the purposes of learning or decision-making.

---

---

---

---

---

---

---

---





## Research-Evaluation-Quality Improvement

• From Fraser Health (2017):



26

---

---

---

---

---

---

---

---

## Research-Evaluation-Quality Improvement

• From Fraser Health (2017):



27

---

---

---

---

---

---

---

---

## Research-Evaluation-Quality Improvement

• From Fraser Health (2017):



28

---

---

---

---

---

---

---

---

## Research-Evaluation-Quality Improvement

- From Fraser Health (2017):



29

---

---

---

---

---

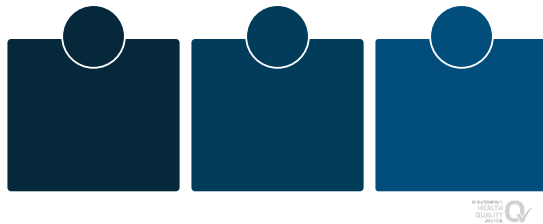
---

---

---

## Evaluation Approaches

- Different approaches for projects/programs in different stages for different purposes



30

---

---

---

---

---

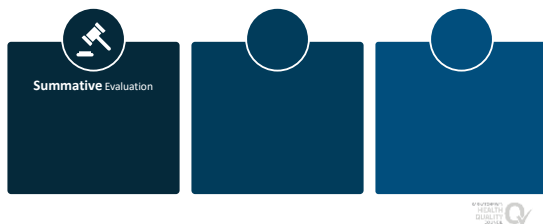
---

---

---

## Evaluation Approaches

- Different approaches for projects/programs in different stages for different purposes



31

---

---

---

---

---

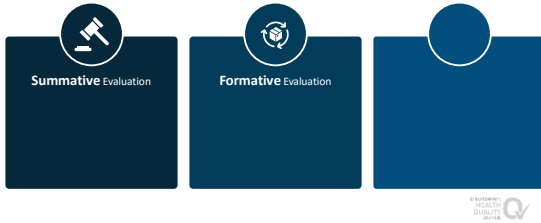
---

---

---

## Evaluation Approaches

- Different approaches for projects/programs in different stages for different purposes



32

---

---

---

---

---

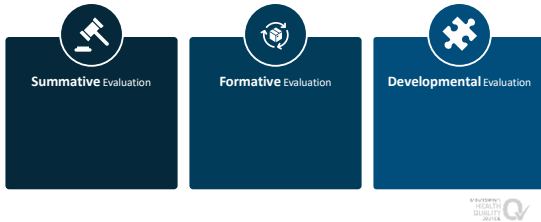
---

---

---

## Evaluation Approaches

- Different approaches for projects/programs in different stages for different purposes



33

---

---

---

---

---

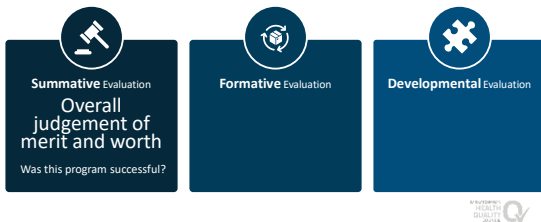
---

---

---

## Evaluation Approaches

- Different approaches for projects/programs in different stages for different purposes



34

---

---

---

---

---

---

---

---

## Evaluation Approaches

- Different approaches for projects/programs in different stages for different purposes



35

---

---

---

---

---

---

---

---

## Evaluation Approaches

- Different approaches for projects/programs in different stages for different purposes



36

---

---

---

---

---

---

---

---

Link of Developmental Evaluation to Quality Improvement

37

---

---

---

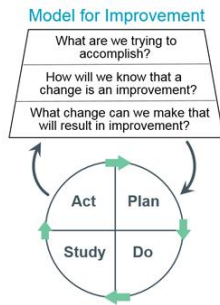
---

---

---

---

---



38

---

---

---

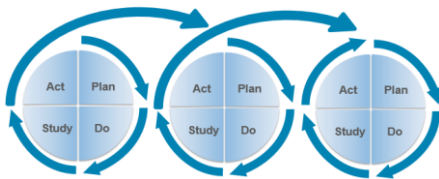
---

---

---

---

---



39

---

---

---

---

---

---

---

---

An analogy with food...

40

---

---

---

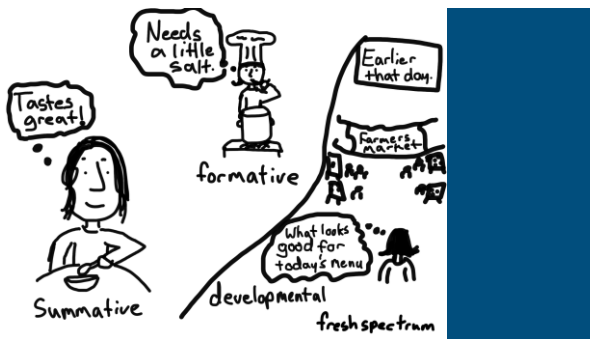
---

---

---

---

---



41

---

---

---

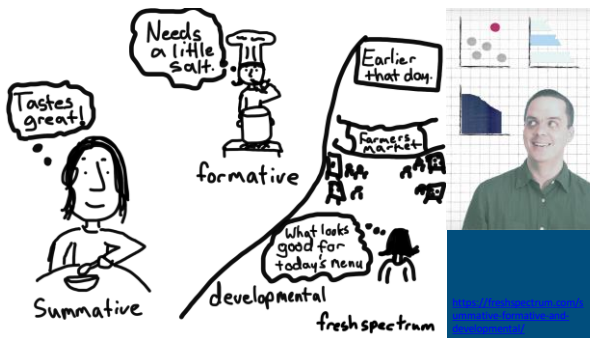
---

---

---

---

---



42

---

---

---

---

---

---

---

---



43

---

---

---

---

---

---

---

---



44

## Who is an Evaluator?

- Snarky answer:

Someone who evaluates




---

---

---

---

---

---

---



45

## Who is an Evaluator?

- Snarky answer:
  - Someone who evaluates
- Any one can evaluate something
- YOU could be an evaluator (and might have to be on your team)
- It's something we do all the time




---

---

---

---

---

---

---



46

## You're probably already an evaluator

Definition:  
Evaluation is the systematic assessment of the design, implementation or results of an initiative for the purposes of learning or decision-making.




---

---

---

---

---

---

---



47

## You're probably already an evaluator

### Definition:

Evaluation is the systematic assessment of the design, implementation or results of an initiative for the purposes of learning or decision-making.




---

---

---

---

---

---

---



48

## You're probably already an evaluator

### Definition:

Evaluation is the systematic assessment of an initiative for the purposes of learning or decision-making.




---

---

---

---

---

---

---



49

## You're probably already an evaluator

### Definition:

Evaluation is the systematic assessment of an initiative for the purposes of learning or decision-making.

### Initiative can be:

- What to purchase?
  - Car
  - Phone
  - TV
- Making a move




---

---

---

---

---

---

---





50

## You're probably already an evaluator

Definition:

Evaluation is the systematic assessment of an initiative for the purposes of learning or decision-making.

Initiative can be:

- What to purchase?
  - Vehicle
  - Phone
  - TV
- Making a move




---

---

---

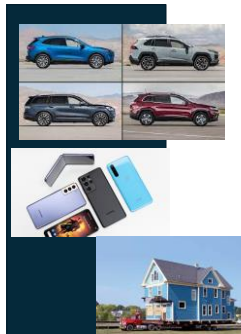
---

---

---

---

---



51

## You're probably already an evaluator

Definition:

Evaluation is the systematic assessment of an initiative for the purposes of learning or decision-making.

Initiative can be:

- What to purchase?
  - Vehicle
  - Phone
  - TV
- Making a move




---

---

---

---

---

---

---

---



52

## Who is an Evaluator?

If everyone's an evaluator, what makes "professional evaluators" special?




---

---

---

---

---

---

---

---



## Who is an Evaluator?

If everyone's an evaluator, what makes "professional evaluators" special?

- Education and Experience in:
  - Evaluation methods
  - Working/leading stakeholders



53

---

---

---

---

---

---

---

---



## Who is an Evaluator?

### CES Evaluator Competencies

36 competencies in 5 domains:

1. Reflective Practice
2. Technical Practice
3. Situational Practice
4. Management Practice
5. Interpersonal Practice

Rigorous application process to demonstrate achievement of at least 70% of each of the 5 domains.



54

---

---

---

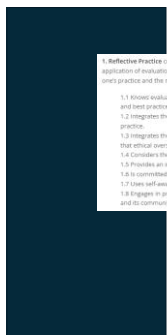
---

---

---

---

---



4. **Reflective Practice** competencies focus on the evaluator's knowledge of evaluation theory and practice; application of evaluation standards, guidelines, and ethics; and awareness of self, including reflection on one's practice and the need for continuous learning and professional growth.
- 4.1 Knows evaluation theories, models, methods and tools and stays informed about new thinking and best practices.
  - 4.2 Integrates the Canadian/US Joint Committee Program Evaluation Standards in professional practice.
  - 4.3 Integrates the Canadian Evaluation Society's stated ethics in professional practice and ensures that ethical oversight is maintained throughout the evaluation.
  - 4.4 Considers the well-being of human and natural systems in evaluation practice.
  - 4.5 Provides an independent and balanced perspective in all aspects of the evaluation.
  - 4.6 Is committed to transparency in all aspects of the evaluation.
  - 4.7 Uses self-awareness and reflective thinking to continually improve practice.
  - 4.8 Engages in professional networks and activities and contributes to the evaluation profession and its community of practice.

## Who is an Evaluator?



55

---

---

---

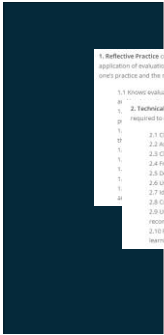
---

---

---

---

---



1. **Reflective Practice** competencies focus on the evaluator's knowledge of evaluation theory and practice; application of evaluation standards, guidelines, and ethics; and awareness of self, including reflection on one's practice and the need for continuous learning and professional growth.

evaluator?

- 1.1 Knows evaluation theories, models, methods and tools and stays informed about new thinking
- 2. **Technical Practice** competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.
- 2.1 Clarifies the purpose and scope of the evaluation.
- 2.2 Assesses program evaluability.
- 2.3 Clarifies the program theory.
- 2.4 Frames evaluation topics and questions.
- 2.5 Develops evaluation designs.
- 2.6 Uses appropriate evaluation methods.
- 2.7 Identifies data requirements, sources, sampling, and data collection tools.
- 2.8 Collects, analyzes and interprets data using appropriate methods.
- 2.9 Uses findings to answer evaluation questions and, where appropriate, to develop recommendations.
- 2.10 Produces complete and balanced evaluation reporting to support decision-making and learning.



56

---

---

---

---

---

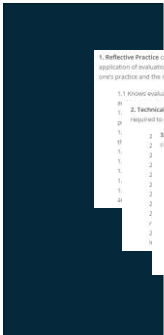
---

---

---

---

---



1. **Reflective Practice** competencies focus on the evaluator's knowledge of evaluation theory and practice; application of evaluation standards, guidelines, and ethics; and awareness of self, including reflection on one's practice and the need for continuous learning and professional growth.

evaluator?

- 1.1 Knows evaluation theories, models, methods and tools and stays informed about new thinking
- 2. **Technical Practice** competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.
- 3. **Situational Practice** competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.
- 3.1 Examines and responds to the multiple human and natural contexts within which the program is embedded.
- 3.2 Identifies stakeholders' needs and their capacity to participate, while recognizing, respecting, and responding to aspects of diversity.
- 3.3 Requests all stakeholders and strives to build and maintain trusting relationships.
- 3.4 Promotes and facilitates usefulness of the evaluation process and results.
- 3.5 Identifies and responds to changes in the context of the program and considers potential positive and negative impacts of the evaluation.
- 3.6 Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and stakeholders to enhance evaluation capacity for all.
- 3.7 Uses evaluation processes and practices that support reconciliation and build stronger relationships among indigenous and non-indigenous peoples.



57

---

---

---

---

---

---

---

---

---

---



1. **Reflective Practice** competencies focus on the evaluator's knowledge of evaluation theory and practice; application of evaluation standards, guidelines, and ethics; and awareness of self, including reflection on one's practice and the need for continuous learning and professional growth.

evaluator?

- 1.1 Knows evaluation theories, models, methods and tools and stays informed about new thinking
- 2. **Technical Practice** competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.
- 3. **Situational Practice** competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.
- 4. **Management Practice** competencies focus on applying sound project management skills throughout the evaluation project.
- 4.1 Provides leadership to the evaluation project.
- 4.2 Defines work parameters, plans and agreements for the evaluation.
- 4.3 Identifies and effectively uses required human, financial, and technical resources.
- 4.4 Coordinates the work of other team members.
- 4.5 Uses group management and facilitation skills.
- 4.6 Communicates project progress to all concerned.
- 3.7 Uses evaluation processes and practices that support reconciliation and build stronger relationships among indigenous and non-indigenous peoples.



58

---

---

---

---

---

---

---

---

---

---

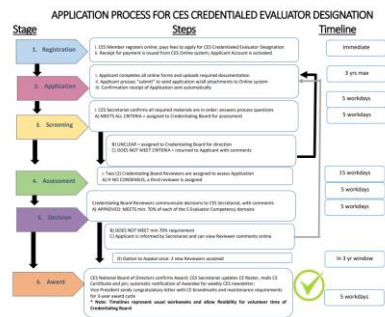
valuator?

1. Knows evaluation theories, methods and tools and draws information about new thinking
2. **Technical Practice** competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.
3. **Situational Practice** competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.
4. **Management Practice** competencies focus on ongoing sound project management skills throughout the evaluation project.
5. **Interpersonal Practice** competencies focus on the social and personal skills required to communicate and interact effectively with all stakeholders.
- 5.1 Uses communication skills appropriate to the culture, linguistic, social, and political context.
- 5.2 Demonstrates effective and appropriate written and verbal communication skills.
- 5.3 Demonstrates effective, appropriate, and respectful verbal and non-verbal communication skills.
- 5.4 Uses a variety of processes that result in mutually reinforcing agreements, shared understanding, and consensus building.
- 5.5 Builds partnerships within the evaluation context.





59



60



MEDICAL  
 HEALTH  
 QUALITY  
 2018

61

Can you now explain who an evaluator is to children?

---

---

---

---

---

---

---

62



---

---

---

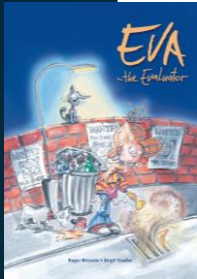
---

---

---

---

63



Eva The Evaluator

---

---

---

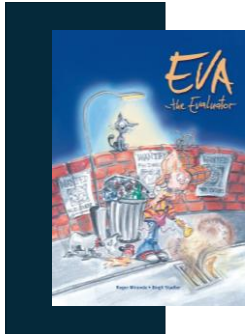
---

---

---

---

64



65

## Eva The Evaluator

- Written by Roger Miranda
- Illustrated by Birgit Stadler
- Written to address explaining evaluation to children (has become a tool to educate adult clients as well!)




---

---

---

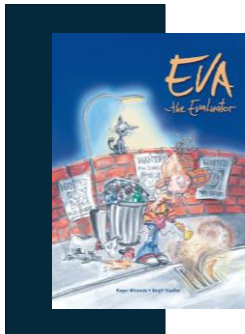
---

---

---

---

---



66

## Eva The Evaluator

- Eva comes home from school where they talked about their parents' jobs. Mom is a doctor, but she didn't know what her dad does (as an evaluator)




---

---

---

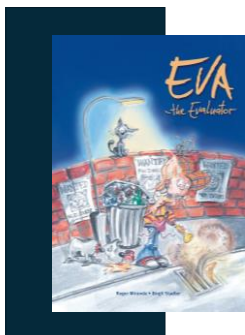
---

---

---

---

---



67

## Eva The Evaluator

As read by Michael Quinn Patton and his daughter Charmagne Elise Campbell-Patton

- [https://www.youtube.com/watch?v=x7qRI2\\_b-C8](https://www.youtube.com/watch?v=x7qRI2_b-C8)




---

---

---

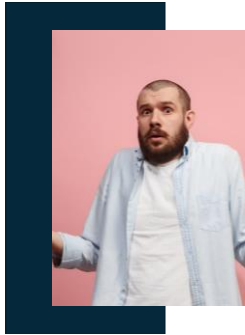
---

---

---

---

---



68

## How do I do Evaluation?




---

---

---

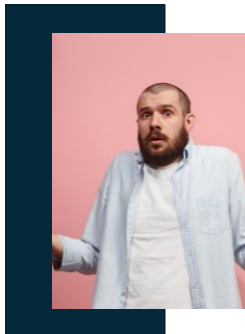
---

---

---

---

---



69

## How do I do Evaluation?

- Lots of different approaches, methods, tools, statistics, programs, etc.
  - American Evaluation Association has 60+ topical interest groups (i.e., Collaborative, Participatory & Empowerment Evaluation; Mixed Methods Evaluation; Research, Technology & Development Evaluation)




---

---

---

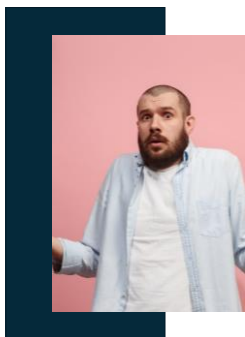
---

---

---

---

---



70

## How do I do Evaluation?

- Once you gain more experience, you can bounce around different tools as needed for the situation (value of pro eval)
- Rainbow Framework:
  - [https://www.betterevaluation.org/rainbow\\_framework](https://www.betterevaluation.org/rainbow_framework)
  - Gives you a guide to the structure of evaluation and a detailed list of things to Google




---

---

---

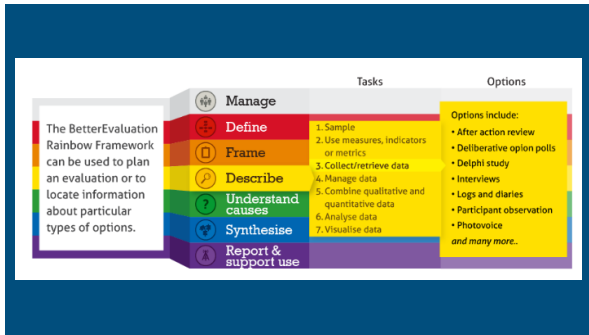
---

---

---

---

---



71

---

---

---

---

---

---

---

---



## MANAGE an evaluation or M&E System

- Decide how the evaluation or the M&E system will be managed, including clarifying stakeholders, roles and decision-making processes, and ensure processes for these are transparent and well-managed.
- Alvin's tips:
  - Initial meetings to set project goals, member roles, and stakeholders
  - Project Charter
  - Team Charter
  - Revisit as needed



72

---

---

---

---

---

---

---

---



## MANAGE an evaluation or M&E System

- Alvin's tips:
  - Initial meetings to set project goals, member roles, and stakeholders
  - Project Charter
  - Team Charter
  - Set check-in points to stay on track
  - Revisit as needed



73

---

---

---

---

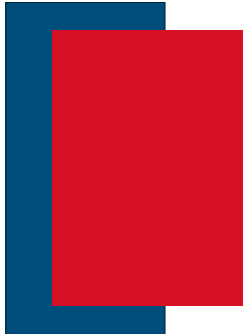
---

---

---

---





74

## DEFINE what is to be evaluated

- Develop a description (or access an existing version) of what is to be evaluated and how it is understood to work.




---

---

---

---

---

---

---

---



75

## DEFINE what is to be evaluated

- Alvin's Tips:
  - Build off from initial discussions
  - Program theory / theory of change
  - Logic model
  - Involve as many different perspectives as possible
    - E.g., physicians, nurses, clinic managers, medical office assistants, patients




---

---

---

---

---

---

---

---



76

## FRAME the boundaries for an evaluation

- Set the parameters of the evaluation – its purposes, key evaluation questions and the criteria and standards to be used.




---

---

---

---

---

---

---

---



77

## FRAME the boundaries for an evaluation

- Alvin's tips:
  - Develop Evaluation Framework




---

---

---

---

---

---

---

---



78

## FRAME the boundaries for an evaluation

- Alvin's tips:
  - Develop Evaluation Framework




---

---

---

---

---

---

---

---



79

## Evaluation Questions (EQ)

- Dependent on type of evaluation
- Keep them open-ended
  - Closed: Did participants enjoy the program?
  - Open: How do participants characterize their experience?
- Keep them broad (not survey questions)
  - Survey: How satisfied are you with the timeliness of the email from your support worker?
  - Evaluation: To what extent are services delivered in a timely fashion?
- Multiple Indicators
  - EQ: To what extent is the program having a positive impact on families?
  - Indicators:
    - Parents self-reported ability to attend training classes

<https://www.evalacademy.com/articles/how-to-write-good-evaluation-questions?rq=questions>




---

---

---

---

---

---

---

---



## DESCRIBE activities, outcomes, impacts and context

- Collect and retrieve data to answer descriptive questions such as what has happened in terms of the activities of the project, programme, or policy, the various results it has had, and the context in which it has been implemented



80

---

---

---

---

---

---

---

---



## DESCRIBE activities, outcomes, impacts and context

- Alvin's tips:
  - Find processes to tap data collection into
  - Automate as much as possible
    - Allows for rapid analysis/reporting; timeliness
    - Create links from Excel to Word
    - Statistical programming (R, Python)
    - Markdown
  - Don't let perfection get in the way of progress



81

---

---

---

---

---

---

---

---



## UNDERSTAND CAUSES of outcomes and impacts

- Collect and analyze data to answer causal questions about what has produced outcomes and impacts that have been observed.



82

---

---

---

---

---

---

---

---



## UNDERSTAND CAUSES of outcomes and impacts

### • Alvin's tips:

- Gold standard of investigate causation is the double-blind randomized-control trial
- 1. Check the results are consistent with causal contribution
- 2. Compare the results to the counterfactual (control; what if intervention didn't happen?)
- 3. Investigate possible alternative explanations



83

---

---

---

---

---

---

---

---

## SYNTHESISE data from one or more evaluations

- Combine data to form an overall assessment of the merit or worth of the intervention, or to summarize evidence across several evaluations.



84

---

---

---

---

---

---

---

---



## SYNTHESISE data from one or more evaluations

### • Alvin's tips:

- Triangulation: multiple data sources measuring the same thing from different perspective
- Expert Panels (i.e., clinicians to have clinical interpretation of findings)



85

---

---

---

---

---

---

---

---



## Clinical Expert Panels

- 12-month Diet and Exercise Program



86

---

---

---

---

---

---

---

---



## Clinical Expert Panels

- 12-month Diet and Exercise Program
  - Looked at clinical indicators pre- and post-program
  - Found no statistically significant change in clinical indicators (BMI, HbA1C, LDL)



87

---

---

---

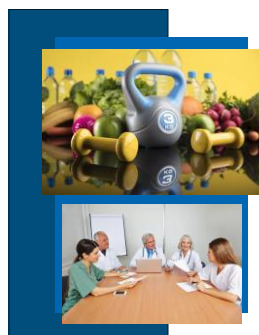
---

---

---

---

---



## Clinical Expert Panels

- 12-month Diet and Exercise Program
  - Looked at clinical indicators pre- and post-program
  - Found no statistically significant change in clinical indicators (BMI, HbA1C, LDL)
- Clinical Expert Panel
  - 4 family physicians interviewed separately were asked about the clinical significance of the findings
  - All 4 said that mitigating deterioration was clinically significant



88

---

---

---

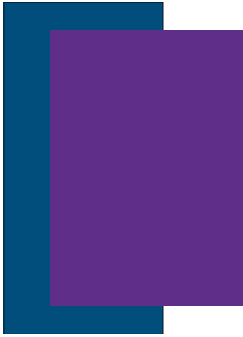
---

---

---

---

---



89

REPORT & SUPPORT USE of findings

- Develop and present findings in ways that are useful for the intended users of the evaluation, and support them to make use of them.



---

---

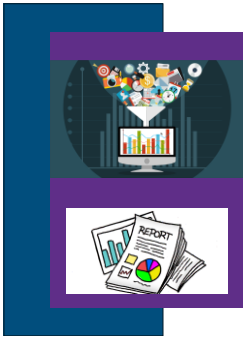
---

---

---

---

---



90

REPORT & SUPPORT USE of findings

- Alvin's tips:
  - Define reporting structure as early as possible; have a plan for data being collected
  - Automate regular reporting; stick to a cadence that facilitates use
  - Include recommendations
  - Have a plan to USE findings



---

---

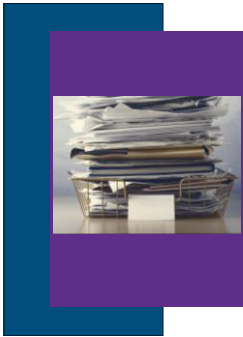
---

---

---

---

---



91

Unread / Unused Reports

- Nothing more demoralizing than unread/unused reports
- BUT important to build a public record for the future to reflect upon



---

---

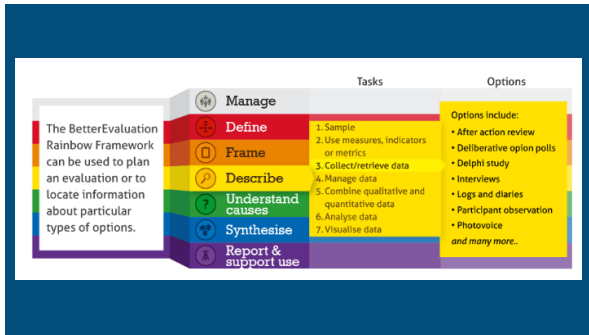
---

---

---

---

---



92

---

---

---

---

---

---

---

---

## Summary

- What is Evaluation?
- Who is an Evaluator?
  - Someone who does evaluation (everyone!)
    - You might be pushed into the role on a team
  - Professional / Credentialed evaluator
  - Eva the Evaluator
- How to conduct an evaluation?
  - BetterEvaluation Rainbow Framework
  - Canadian Evaluation Society

93

---

---

---

---

---

---

---

---

## Additional Reading / Watching

- AEA Coffee Break Webinar on the BetterEvaluation Rainbow Framework:
  - [https://www.betterevaluation.org/events/coffee\\_break\\_webinars\\_2013#webinarPart1](https://www.betterevaluation.org/events/coffee_break_webinars_2013#webinarPart1)
- BetterEvaluation Rainbow Framework:
  - [https://www.betterevaluation.org/rainbow\\_framework](https://www.betterevaluation.org/rainbow_framework)
- Canadian Evaluation Society:
  - <https://evaluationcanada.ca/>
- American Evaluation Association:
  - <https://www.eval.org/>
- Eval Academy
  - <https://www.evalacademy.com/>



94

---

---

---

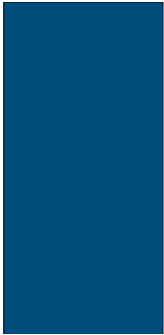
---

---

---

---

---



Additional Listening

- Eval Café Podcast
  - <https://player.fm/podcasts/brian-hoessler>
  - Brian Hoessler is a Saskatoon-based Credentialed Evaluator (<https://www.strongrootsconsulting.ca/>)



95

---

---

---

---

---

---

---



96

---

---

---

---

---

---

---

Do you want |❤️|socks?

Become a QI Power Hour speaker!

 [Visit our website to learn more!](#)



Connect to Audio using Audio Broadcast

97

---

---

---

---

---

---

---



Post webinar survey

In the spirit of quality improvement, we will be sending out a survey after the webinar.

You may see this message, but don't be alarmed, our survey is on a trusted site!



External Site

The host or presenter would like these settings to open a website on your computer. This is not expedient for the content or availability of external sites. We recommend that you follow the website content to those in a trusted source. If you view this page or go to this site, you will be subject to the privacy policy and terms and conditions of the destination site. <https://www.surveymonkey.com/NOTICE>

Continue

98

Connect to Audio using Audio Broadcast



---

---

---

---

---

---

---