
Building Evaluation Competence

Health Promotion
Workbook One

Whakauae Research Services
Whanganui 2009

Building Evaluation Competence: Health Promotion Workbook One

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Acknowledgement: informed by the work of SHORE / Whariki.

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Building Evaluation Competence: Health Promotion Workbook One

1. Starting out

This Workbook covers the **basics** of health promotion project evaluation.

You will get the most out of Workbook One if you:

1. Begin by filling out the top half of the self assessment sheet (Page 3)

☐

2. Work your way through the content in the order in which it is presented

☐

3. Progress through the work at your own pace

☐

4. Do **every** exercise : write and draw diagrams etc in your Workbook

☐

5. Carry out **all** the suggested activities : make observations, discuss with colleagues etc

☐

6. From time to time, review the Workbook content you have covered

☐

A self - assessment form (refer to 1.above) is provided on the following page :

Fill out the top half of the form. This will clarify where your evaluation learning is at, at the moment, from your own point of view.

After completing Workbook One, you will be asked to go back to the self assessment form to review the learning progress you have made.

Building Evaluation Competence: Health Promotion Workbook One

2. Self assessment: your evaluation knowledge & skill

Please circle your level of knowledge etc using continuums 1 - 3 below.

Before starting this Workbook : Date / /

- 1) My understanding of the relationship between health promotion project planning and evaluation is:

Excellent Good OK Limited Very limited

- 2) My understanding of the basics of health promotion project evaluation is :

Excellent Good OK Limited Very limited

- 3) I know what the main types of evaluation are and what the focus of each is :

Yes Unsure No

After finishing this Workbook Date / /

- 1) My understanding of the relationship between health promotion project planning and evaluation is:

Excellent Good OK Limited Very limited

- 2) My understanding of the basics of health promotion project evaluation is :

Excellent Good OK Limited Very limited

- 3) I know what the main types of evaluation are and what the focus of each is :

Yes Unsure No

3. Workbook One learning outcomes

This Workbook will introduce you to the **basics** of health promotion project evaluation. It is designed to meet the needs of practitioners new to the health promotion field and / or new to health promotion evaluation.

**When you have finished Workbook One,
you will have:**

1. A grasp
of how
planning
and
evaluation
fit
together.

2. A grasp
of
evaluation
basics
including :

- (a) Types of evaluation
- (b) Questions which fit with different types and stages of evaluation

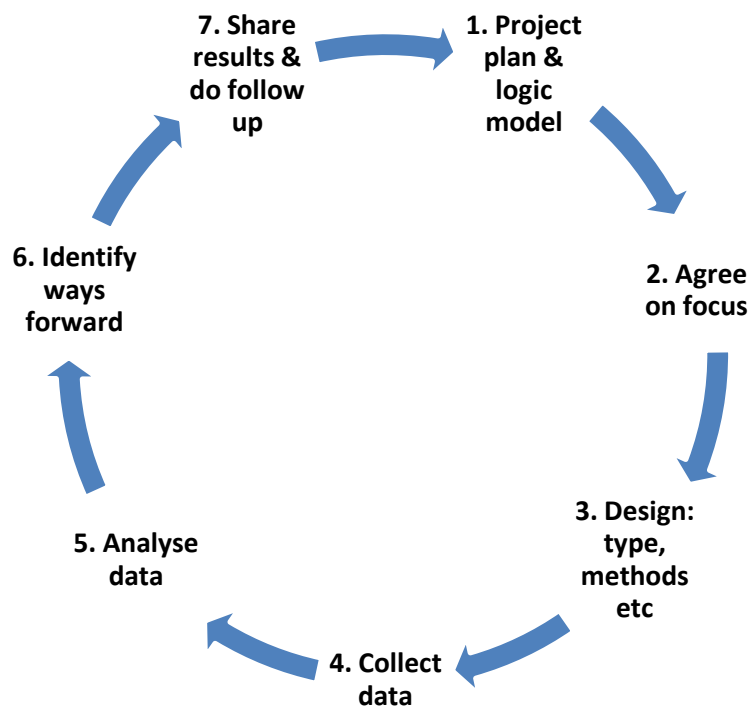
3. An
evaluation
skills base
to build
on.

In this space, write any other health promotion learning goal/s you have.

Today's date : / /

4. Project evaluation model

The model below sets out seven steps in the health promotion evaluation process¹:



Workbook One covers Steps 1 and 2 as well as parts of Step 3, above:

Step 1 Developing a project plan and a logic model; getting stakeholders involved.

Step 2 Deciding on an evaluation focus.

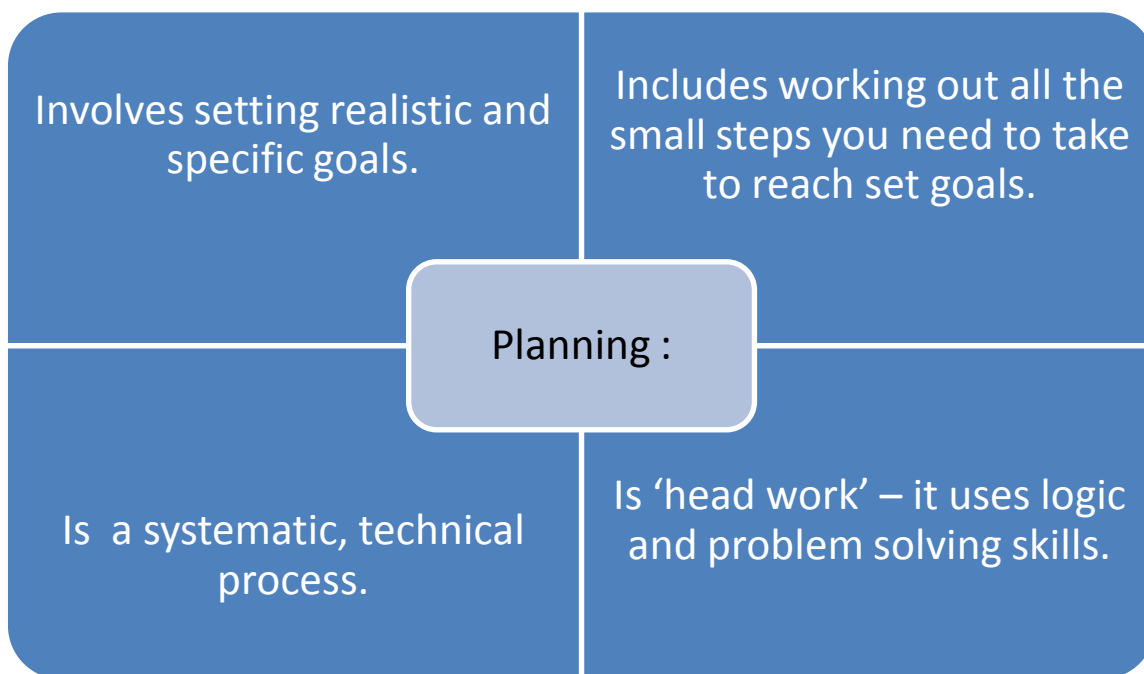
Step 3 Type/s of evaluation which fit best with your evaluation focus; kinds of evaluation questions different types of evaluation aim to answer.

¹ Adapted from Rootman, I., Goodstadt, M., Hyndman, B., McQueen, V., Potvin, L., Springett, J. & Ziglio, E. (Eds). (2001).

5. What has planning got to do with health promotion work?

Planning

Some planning characteristics are set out in the diagram below.



Health promotion work

On the other hand, **health promotion work** is often driven by a kaimahi's (worker's) passion for 'making things better', especially for people who are disadvantaged.

Health promotion work is about communities being fair, socially just and committed to the wellbeing of all their members.

Health promotion work should be 'heart work' according to some kaimahi. Knowing what to do, how to do it and when comes from the heart and not from the head.

(1) If a health promoter has the passion and really 'knows' and believes in their community do they need to bother with planning their work? Use this space to write down what you think.

Date / /

(2) Now, ask your health promotion team leader, or mentor, if they think planning is an important part of health promotion work. Why / why not? Record their comments here :

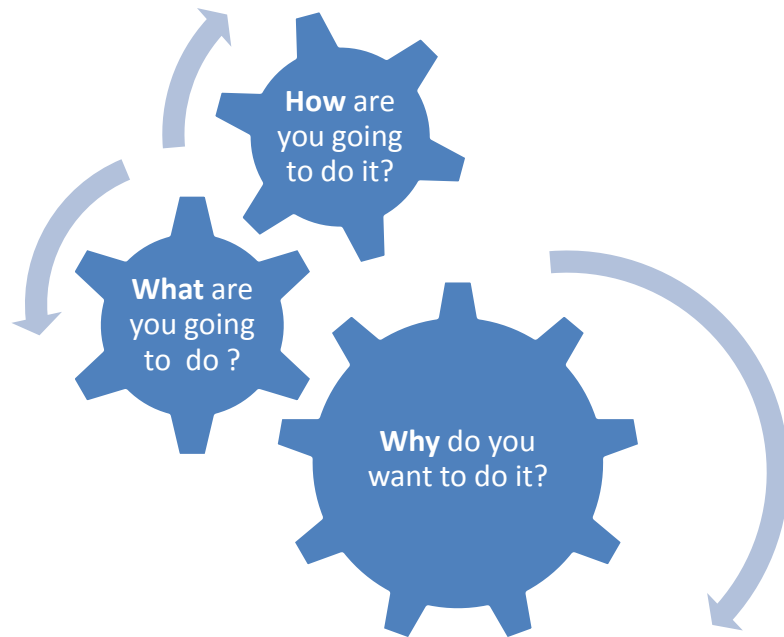
(3) In what ways are the views of your team leader, or mentor, different from your own? Note the differences here:

Date : / /

Planning & health promotion mahi: key points

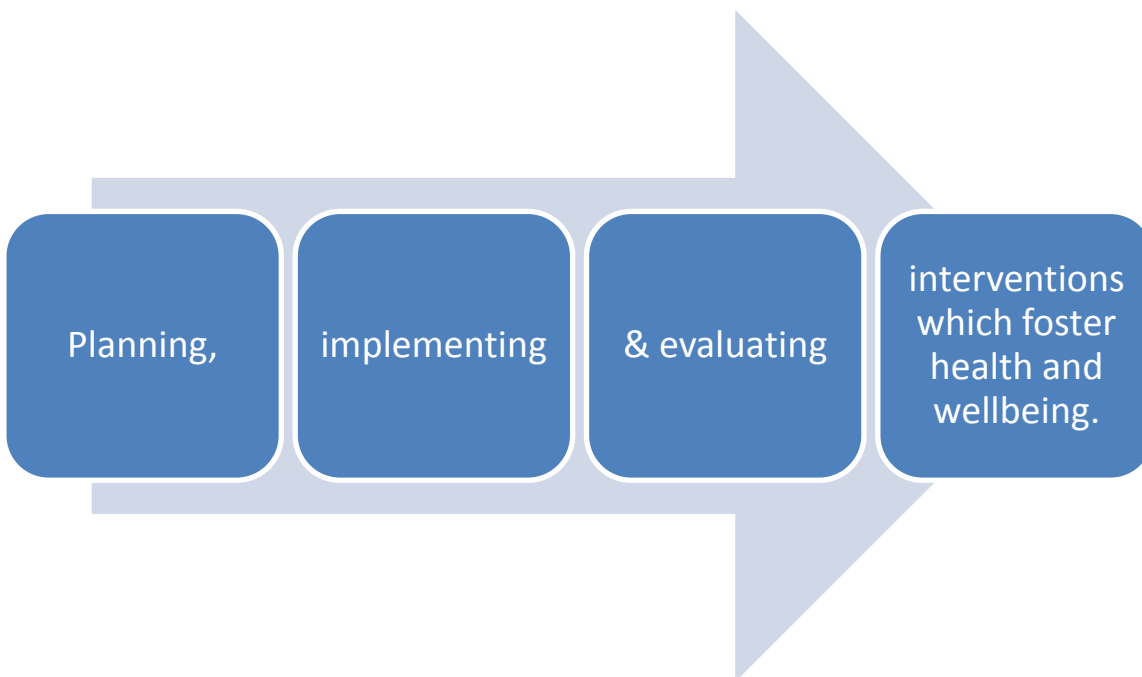
To be **effective**, it is critical that health promotion work includes **planning**. Without good planning, you have **no way of knowing** if you really are helping your community.

- Important planning questions are identified in the diagram below:



Other planning questions include: **Who** will do what? **When** will it be done? **Where**?

- Health promotion is a **process**. It involves:



- **Good health promotion planning is about:**
 - drawing on a solid ‘evidence - base’ / critical analysis for your work;
 - involving others (the wider community);
 - agreeing on an **evidence informed** goal, objectives and strategies (see Appendix One for a planning template) in partnership with your project group. To do this you need to harness group energy;
 - **keeping a record** of what the project group has agreed on (ie minutes of meetings, project plan and logic model drafts etc); and,
 - **using the above tools** (project plan, logic model etc) as constant points of reference during the term of the project.

What do you already know about project planning and logic modelling? *In this space, describe your existing planning / logic modelling knowledge and experience.*

Date / /

More detailed information about how to plan health promotion projects is available from a number of sources. Some of these are listed in Part 10 of this Workbook.

A logic model:

Translates all the words (project plan) into a single picture.

Is a simple, clear, **visual representation** of your group's project plan.

Is a tool which can help a project group clarify its thinking about its project work.

Is based on logical thinking not just 'pie in the sky' wishful thinking.

Cuts down on the risk of confusion and people 'getting their wires crossed'.

Communicates the framework of your project to wider audiences.

Provides a **framework for your project evaluation plan**.

(4) In this space, draw a logic model template diagram (include the title of each 'part' of the model. You don't need to apply the model to a real project).

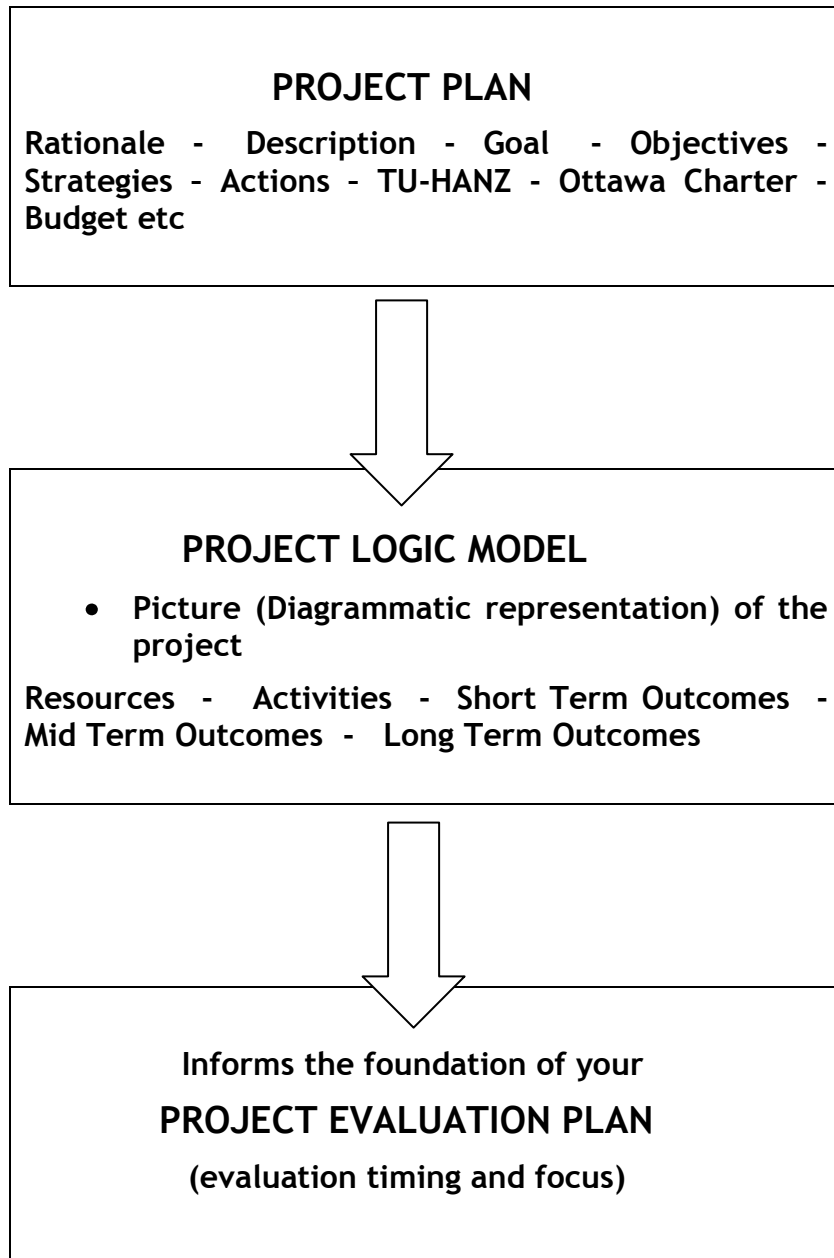
Date / /

A project logic model template diagram is included in the Appendices at the back of this Workbook. Take a look at this now and check out how it compares with the version you drew in the box above.

How do my project plan, logic model & evaluation plan fit together?

The diagram on Page 11 sets out the relationship between your project plan, your logic model and your **evaluation plan**. Your evaluation work, like your project work, will benefit from being planned rather than carried out in an ad hoc way.

The relationship between (1) planning /modelling your health promotion project & (2) planning the project evaluation :



❖ *You will need a project plan and a project logic model before you can usefully evaluate your project. Getting these things sorted is the first step in your evaluation work.*

5. Why evaluate?

Circle statements below which you agree with

Evaluation is:

A WAY OF HELPING US TO IMPROVE PROJECT WORK

*An external demand which
means less time to spend on
doing the 'real' work*

A waste of time

too hard for us to do

a good way of finding out why a
project has turned out the way
it has

POTENTIALLY EMPOWERING

A GOOD WAY OF HELPING A PROJECT TEAM
CLARIFY WHAT WE ARE TRYING TO DO &
STRENGTHEN HOW WE ARE DOING IT

A judgment on
my work by people who
know nothing about it

EXPENSIVE!!!!

A complex activity which needs to be carried out by professionals

Of limited value to the people and communities I want to help

Activity: Discuss the worksheet statements you circled with your health promotion team leader. Write down the main points of your discussion here:

Date / /

Values: health promotion & evaluation

Fairness and social justice are important health promotion values.

What are some other health promotion values and principles?
List these here (and refer to www.hpforum.org.nz for more information)

Date / /

These kinds of values and principles are equally important when **evaluating** health promotion work.

They can be reflected in things like:

- **How** the evaluation is carried out
 - Does it allow for the full participation of stakeholders?
 - Is it respectful of the community the project serves?
- **What** the purpose of the evaluation is (is it about improving practice? Helping to ensure accountability to your community and funders?).

Evaluation works best when it:

(1) Is clearly linked with a project plan, project logic and project work.

An evaluation plan sits alongside the project plan and logic model. It sets out which activities and outcomes will be evaluated and how.

What do you think about statement (1)? Do you agree or disagree and why? *(record your thoughts in this space)* :

Date / /

(2) Includes meaningful input of people with an interest in the project.

Participation is empowering. It means involving project stakeholders in deciding:

- ❖ what project success will 'look like';
- ❖ what questions need addressing; and,
- ❖ how best to find the answers.

What do you think about statement (2)? Do you agree or disagree and why? *(record your thoughts in this space)* :

(3) Supports a project team's learning and reflection on practice.

The focus is on continuing to improve our project work rather than on 'proving our project works'.

What do you think about statement (3)? Do you agree or disagree and why? (*record your thoughts in this space*) :

(4) Collects the most information with the least effort.

A focus on what the project group **needs** to know is important. What bits of information will contribute to:

- ❖ improving the project ?
- ❖ meeting accountability commitments?

Not **everything** needs to be evaluated just for the sake of it.

What do you think about statement (4)? Do you agree or disagree and why? (*record your thoughts in this space*)

6. Types of evaluation

Three broad **types** of evaluation are most often used in health promotion work. These are listed below (1, 2 & 3).

*Draw a line connecting each of these **types** of evaluation (1, 2 & 3) with the description (boxes A, B & C below) which you think best matches it.*

(1) Formative

(2) Process

(3) Impact / Outcome

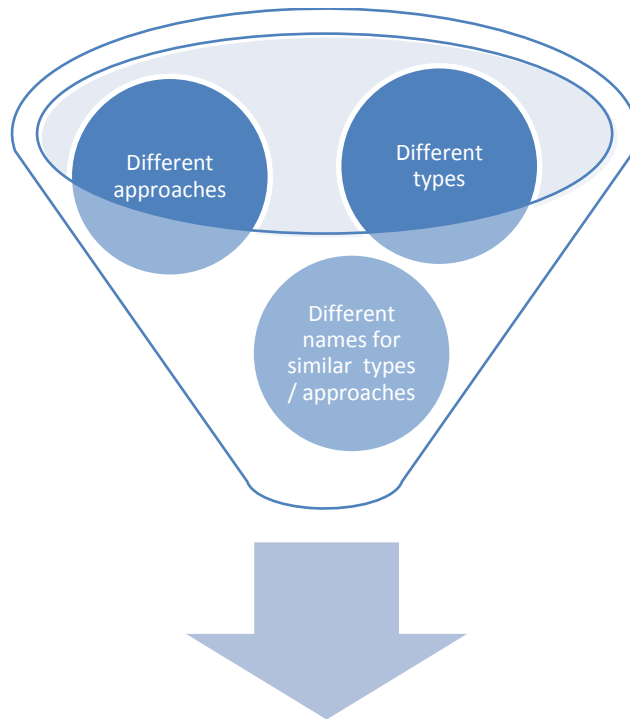
(A) Asks questions about the information which the project is based on. What information are we using? Where from? How 'good' is it? What are the alternatives? How do we know this is the 'best' way of doing things? Have we developed a robust plan/logic model?

(B) Asks questions about the short term changes the project has made to people's attitudes, skill, knowledge etc. Asks questions about longer term changes to behaviour, knowledge etc, long term environmental changes and project end results.

(C) Asks questions about how the project operates (who, what, when etc). Is the project running as planned? Why not? Does it meet people's needs? How are they experiencing it? What resources are being used and how?

- ❖ Evaluation is a broad field of research and is carried out across many areas of human activity including the health services, the social services and in business.

It therefore includes many:



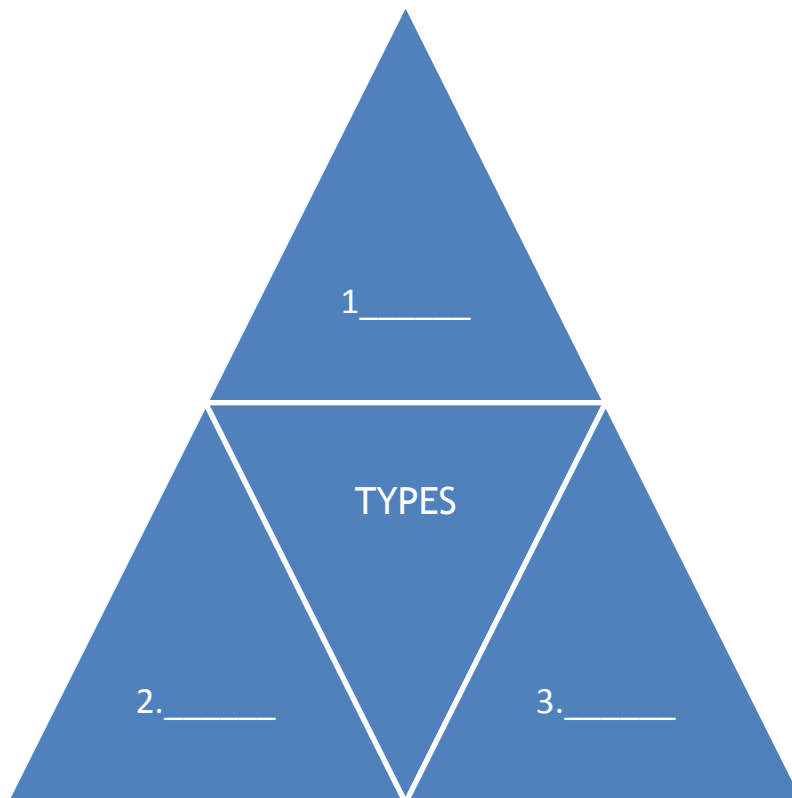
all of which can make 'getting a grip' on evaluation confusing.

Have you noticed some of the *different* terms which seem to be used for *similar* types of evaluation? If so, make a note of these here and 'park' them for now.

Date / /

Finally, fill in the gaps in the diagram below to complete this section of the Workbook.

The **types** of evaluation health promotion most often uses are:



7. Evaluation activities & questions

Each of the 3 main **types** of health promotion evaluation (formative, process and impact / outcome) are linked with different kinds of **evaluation activity**. Some of these are listed below:

(1) **Formative evaluation activities:** (*refer to box (A) on page 16*)

- reviewing and checking the project plan;
- reviewing and checking the logic model;
- pre-testing and reviewing project materials; and
- piloting and reviewing project activities.

❖ *What kinds of questions might a formative evaluation try to answer?*

Examples could be: is the panui / invitation we have designed easily understood by the target audience? Do the project plan strategies fit well with the project objectives?

❖ *Write an example of your own in this space :*

Date / /

(2) **Process (or implementation) evaluation activities:** (refer to box (C) on page 16)

- Describing project activities (what was done)
- Describing project outputs (what was produced)
- Identifying how well the activities worked, what factors contributed to this and how?

❖ *What kinds of questions might a process evaluation try to answer about a project activity or project output?*

(Examples could be: how many workshops were run? what multi-media channels did a campaign make use of? how?).

❖ *Write an example of your own in this space :*

❖ *What kinds of questions might a process evaluation try to answer about how well project activities worked?*

(Examples could be: what did participants think of the workshop content? What did the target group think about delivery of your campaign message?).

❖ *Write an example of your own in this space :*

Date / /

(3) **Outcome (or impact) evaluation activities :** (refer to box (B) on page 16)

- Measuring changes in project participant knowledge, skill and / or attitude

- Measuring changes in project participant behaviour
- Measuring changes in social and environmental context

❖ *What kinds of questions might an outcome evaluation try to answer about changes in participant knowledge?*

(An example could be: did participants know more about healthy cooking after going to the healthy cooking workshops you ran?)

❖ *Write an example of your own in this space :*

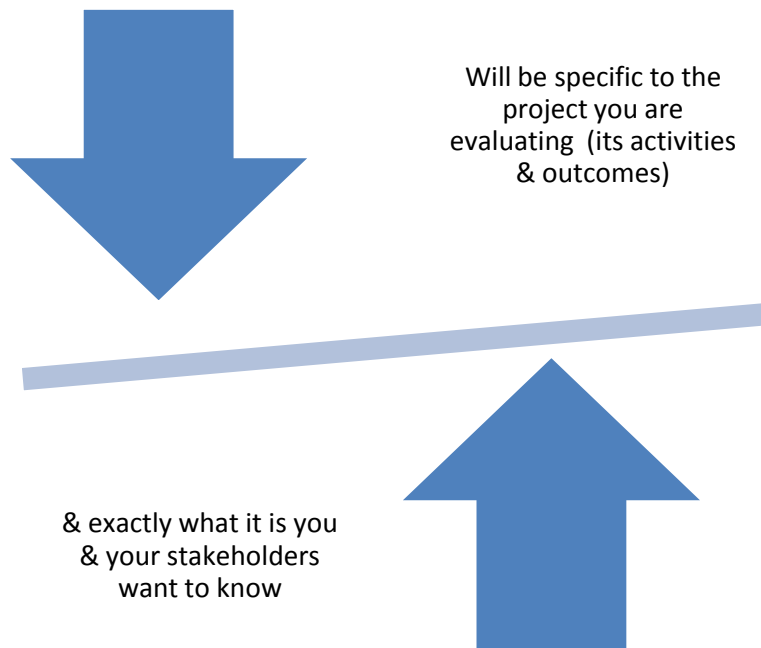
❖ *What kinds of questions might an outcome evaluation try to answer about changes in social and environmental context? (An example could be: have local sports clubs developed safer alcohol policies after participating in the project?).*

❖ *Write an example of your own in this space :*

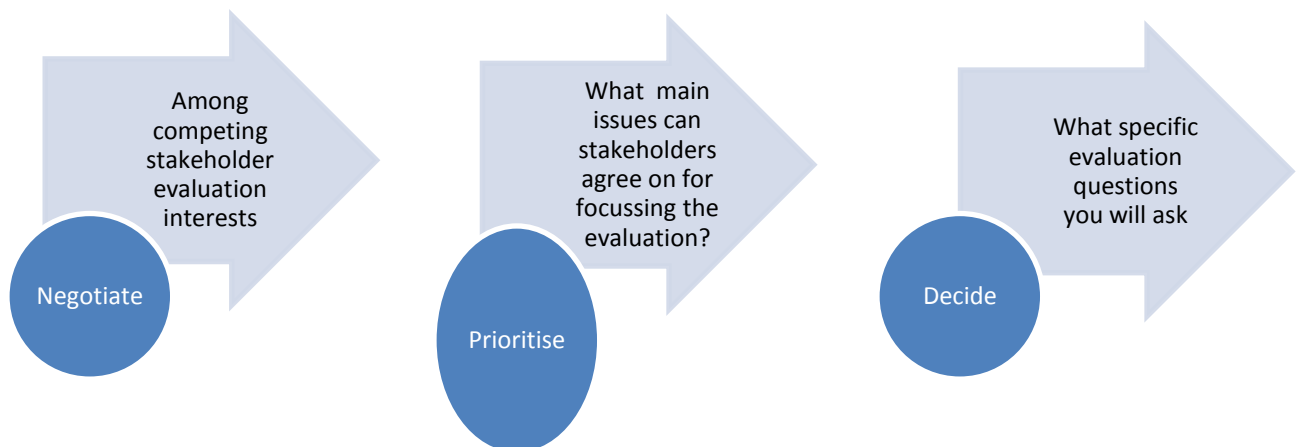
The above examples will have given you a broad idea of the kinds of evaluation questions associated with the different types of health promotion evaluation.

In practice though, you will need to work on developing questions relevant to your project and what it is you and your stakeholders want to find out.

Your project group's evaluation questions:



You and your project group will need to :



- ❖ Finally: Is the evaluation focus possible and practical? Do you have the resources to find out the things you want to know about? If not you will need to re-focus the evaluation. Bear in mind that three to five **broad** evaluation questions per project will be sufficient.

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9. Final points

1. Evaluation statements worksheet

Turn to Page 12 of your Workbook and complete the evaluation statements worksheet again. This time use a different colour than you used the first time.

What differences, if any, are there in the statement selection choices you made this time compared to previously? Note these here :

2. Learning outcomes

Turn to page 4 of the Workbook.

Review the set learning outcomes and revisit the learning goal/s you set for yourself and recorded on page 4.

In this space, note the progress you have made towards reaching the :

(a) Workbook learning outcomes

(b) the learning goal/s you set for yourself

Date / /

3. Self assessment

Now return to the self-assessment sheet you completed on page 3 of this Workbook.

Fill out the bottom half of the self-assessment sheet.

Compare your scores with those you marked on the top half of the self-assessment sheet.

In this space, comment on the differences (if any) between your scores prior to completing the Workbook and now :

4. Finally

You may find it useful to re-visit the content of this Workbook when you are planning your next project evaluation.

Workbooks Two and Three, which follow on from this Workbook, also make reference to some of the points covered here. As you progress through Workbooks Two and Three, it will therefore be taken for granted that you are familiar with the material covered in Workbook One.

It will be useful to keep Workbook One and make reference to it as required.

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10. Useful sources of information

Green, J. & South, J. (2006). *Evaluation: Key Concepts for Public Health Practice*, UK: Open University Press.

Innovation Network Inc. *Evaluation Plan Workbook*, USA : www.innonet.org

Innovation Network Inc. *Logic Model Workbook*, USA : www.innonet.org

Nutbeam, D. & Bauman, A.(2006). *Evaluation in a Nutshell : A practical guide to the evaluation of health promotion programs*, Australia : McGraw-Hill.

Rootman, I. ,Goodstadt,M., Hyndman, B., McQueen, V., Potvin, L., Springett, J. & Ziglio, E. (Eds). (2001). *Evaluation in health promotion: Principles and perspectives*, World Health Organisation Regional Publications, European Series No 92.

Te Runanga Whakapiki ake I te Hauora o Aotearoa / Health Promotion Forum of New Zealand. (2007). *What is Health Promotion?* www.hpforum.org.nz

Waa, A. Holibar,F. & Spinola,C. (1998). *Programme Evaluation: An Introductory Guide for Health Promotion*, Auckland: Alcohol & Public Health Research Unit, University of Auckland. The above guide is now out of print. However, it can be accessed online at <http://www.aphru.ac.nz/services/services/manual.htm>

Wiggins,M., Bonell, C. & Burchett, H. (2006). 'Evaluating health promotion' in Macdowall, W., Bonell, C. & Davies, M. (Eds). *Health Promotion Practice*, London: Open University Press.

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Appendix One - Project Planning Template (example)

PROJECT PLAN

Date:

1. Name of the project:

2. What are you going to do? (Describe the project here)

3. Why do you want to carry out this project? (Rationale)

4. Who is involved (who is a part of the project group)?

5. Project start and finish dates (timeframe)

6. Project Goal (what is the overall intended aim of the project?):

Objective 1 (*what changes the project is expected to achieve*):

Strategy 1 (*how the above changes will be achieved. Each objective will include at least one strategy and probably more*)

Actions (set out the specifics of each strategy: *who* will do *what* and *when* etc)

Strategy 2

Actions

Strategy 3

Actions

Objective 2

Strategy 1

Actions

Strategy 2

Actions

Strategy 3

Actions

Repeat the above for Objective 3 and so on as necessary depending on the scope of your project.

7. Ottawa Charter (*which of the five Charter strands does the project fit with and why?*)

A) *Builds healthy public policy?*

B) Develops personal skills?

C) Strengthens community action?

D) Creates supportive environments?

E) Reorients the health service?

8. TU-HANZ (Treaty Understanding of Hauora in Aotearoa / New Zealand)

Which Tiriti Articles does the project fit with and how?

Article One:
Kawanatanga/Governance

Article Two :
Tino Rangatiratanga/Maori control & self determination

Article Three:
Oritetanga/Equity

9. Draft Budget: (What are the project costs? How will these costs be met?)

Components: venue hire, catering etc

Approximate costs

Funding Source

10. Ethical issues to take into account:

(Who do you need to consult with to make sure that what you're intending to do is appropriate? eg will it harm anyone in anyway? What protections may need to be put in place and for who etc?)

(adapted from Waa et al 1998).

Appendix Two - Logic Model (example)

Basic Logic Model

