Dartmouth Health

Project ECHO

Center for Program Design & Evaluation
CPDE | Dartmouth College

WELCOME to

Stronger by Design: An ECHO for Practical Strategies to Evaluate and Amplify Impact

Session 1, The Power of Evaluation for Strengthening Communities, October 9, 2025

Series Learning Objectives

1. Creating a program logic model linking key goals and outcomes to program strategies as a roadmap for designing an evaluation to monitor progress and program success
2. Identifying the highest value-to-effort questions to answer through evaluation methods
3. Identifying the highest value data for your program and options for gathering data from existing sources or new methods (e.g., surveys, focus groups)
4. Making sense of data using basic methods and tools (e.g., Excel) and create data visualizations and written summaries for reports
5. Feeling more confident working with data and evaluation principles while recognizing when it may be more efficient and effective to work with evaluation experts to support data needs

Series Sessions

Date	Session Title
10/9/2025	The Power of Evaluation for Strengthening Communities
10/23/2025	Creating a Roadmap to Measure Success
11/6/2025	From Theory to Practice: Hands-on Evaluation Planning Workshop
11/20/2025	Gathering Data and Information about your Program
12/4/2025	Making Sense of Program Data to Help Others See your Value
12/18/2025	From Theory to Practice: Building your Evaluation Tools and Strategy

Center for Program Design & Evaluation
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Session 1:
The Power of Evaluation for Strengthening Communities

Dr. Jennifer Wenner

10.9.2025

Today's Plan

Making Evaluation work *for* you and *with* you

- Making sense of the terms
- Effort to Impact – a little can go a long way
- Seeing your program's 'data' everywhere
- Reviewing and sharing data with your community

Common Questions

Are the people using my program getting what they **really need**?

Are we reaching the **people we intended**? What is **getting in the way** of people using the program?

Is our program being implemented as **efficiently/effectively** as possible? What can we **do better**?

Should we continue to invest in these activities? **Are we having the impact we think we are?**

Myths that can get in the way

“We know our people need X, Y, Z. We’re the experts at designing those kinds of programs and activities.”

“I’ll get some testimonials from the moms who really like our program.”

“We know some people have trouble getting into our program but there’s nothing we can do about that.”

“We’ve been doing this work for decades, it must be working. Look at all the people we serve.”

“We don’t have the time/money to evaluate our programs”

“No one on our team has the training to analyze data.”

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What is Program Evaluation?

“the **systematic collection** of information about the **activities, characteristics, and outcomes** of programs to **make judgments** about the program, **improve** program effectiveness, and/or **inform decisions** about future program development.”

(Patton, 1997)

What is Program Evaluation?

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(Patton, 1997)

The Power of Evaluation

Provides us with ‘real’ information

- Learn and adjust to what constituents need and want
- Reveal processes that no longer work (e.g., a costly marketing campaign that isn’t reaching target audience) and where things are working well
- Data to justify more staff or services
- Results that demonstrate our program impact to people, our communities and partners

Other Reasons to Evaluate

Monitoring program utilization (who, how many, when; *equitable* access)

Resource allocation (do we need all our staff at that event; how many XX did we give out to whom; is this the best use of funding)

Implementation fidelity (do we deliver the program consistently; are refreshers needed)

Knowledge generation (what is our most popular program; why do people come back to us)

Accountability (showing funders / board / community we are doing what we say we are)

Outcome & Impact Assessment (are we succeeding at our mission; are people better because of what we do)

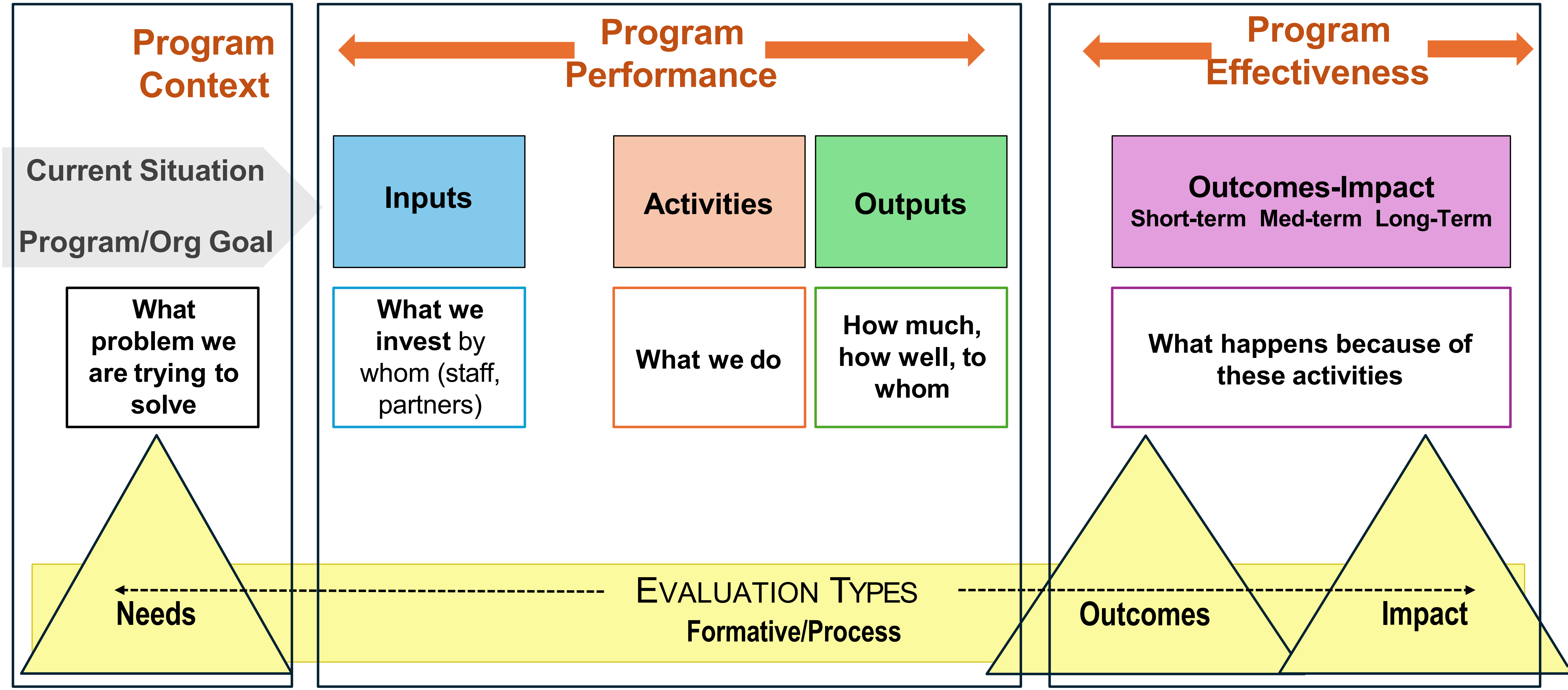
Some Common Evaluation Terms	Meaning and Use
Indicator/Leading Indicator	What we need to see/measure to *know if we've met a goal*
KPIs	Key performance indicators – usually our *priority indicators*
Milestones	Another way to describe an indicator of success: *what we want to see or achieve* with program activities
Metrics (or Measures)	*Things we can count*, observe, listen for, track, & describe to know if we have met a goal; our indicators use these
Data	The *information* we have counted, observed, heard
Methods	The *way* we collect the data/information on our program
Goal	Broad statement about what the *program is trying to accomplish*
Objective	A *specific result or interim step* the program is trying to achieve on the way to meeting a goal

The Three Steps of Nonprofit Measurement, Evaluation, and Learning

Source: The Bridgespan Group

The Three Steps of Nonprofit Measurement, Evaluation, and Learning

Evaluation Types for Your Program Road Map



Adapted from learningforsustainability.net/evaluation-questions

Benefits of a Road Map

Engage program partners

Ensure logical connections

Support strategic planning

Program marketing/website

Inform decision-making and resource prioritization

Photo by Taras Zaluzhnyi on Unsplash

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Effort to Impact

Critical to identify what is most important to learn

- What are the most vital outcomes
- Short → Medium → Long-term

Then what is most feasible to collect/assess

The Three Steps of Nonprofit Measurement, Evaluation, and Learning

Data is Everywhere

Data is information – information that is going to tell you something of importance about your program

- Quantitative – what can be counted
- Qualitative – things people say or that you observe

Primary data – the information *you (your program)* collect

Secondary data – information about your program or users that *others* have collected

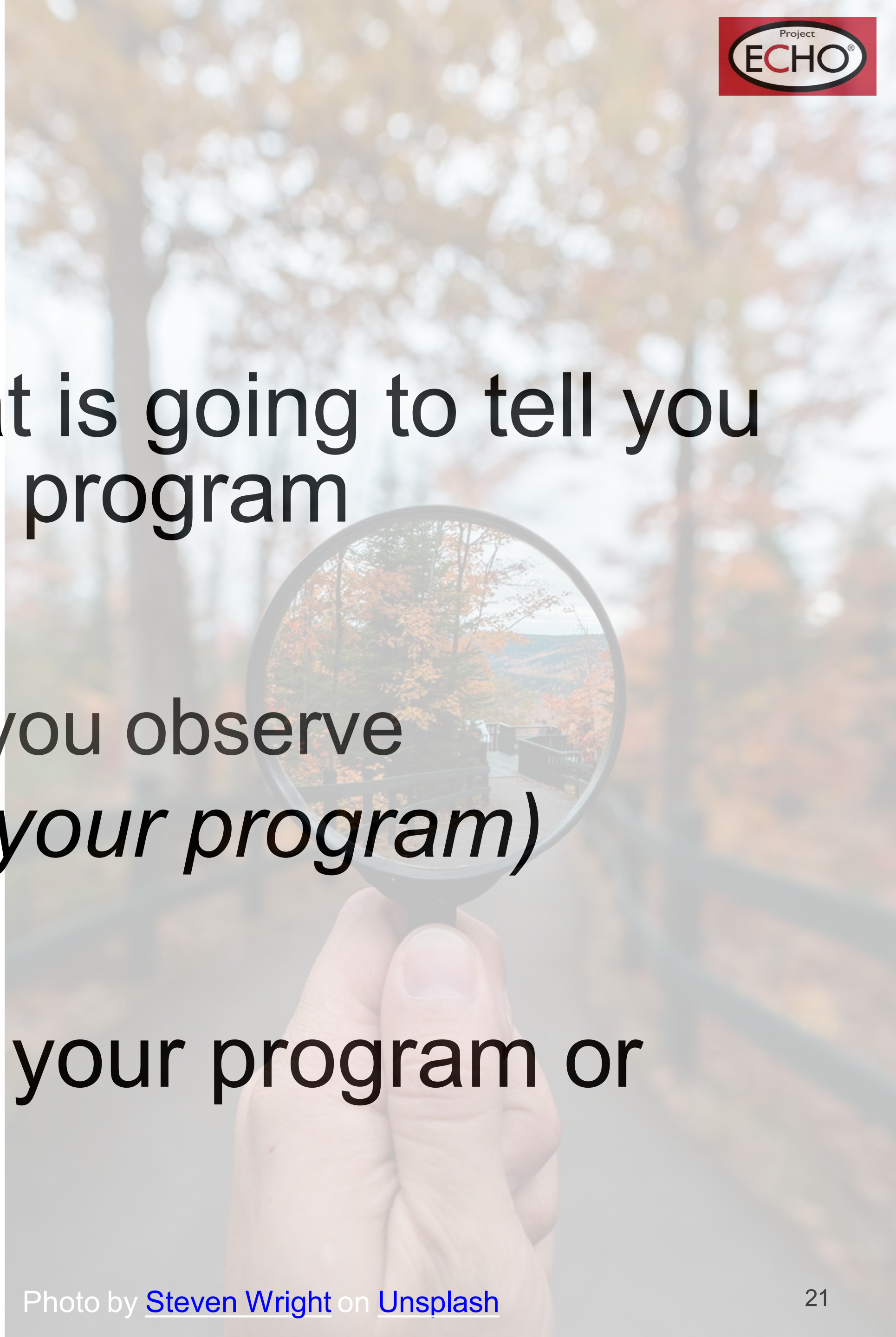


Photo by Steven Wright on Unsplash

The Three Steps of Nonprofit Measurement, Evaluation, and Learning

Using your data to learn and improve

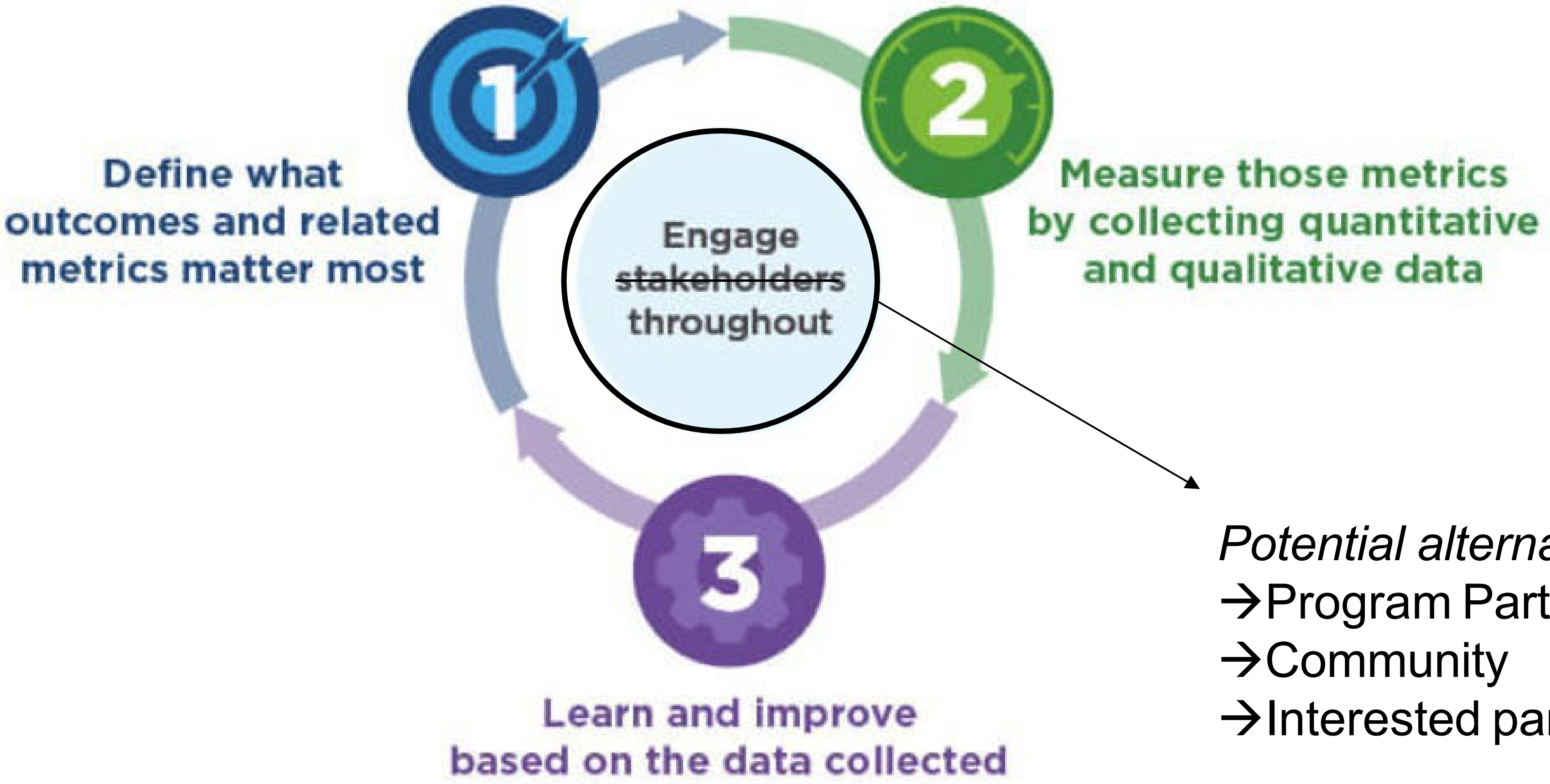
Review data regularly

Data-driven decision-making

Share results with community


skynesher/Getty Images

The Three Steps of Nonprofit Measurement, Evaluation, and Learning



Potential alternatives:
→Program Partners
→Community
→Interested parties

Engaging your community

Not only when collecting data and sharing results, but also when *planning* data collection processes

With each step of evaluation, think about:

- Who should be consulted?
- Who will use the results and what is most useful to know?
- Who will be impacted by the results?

Photo source: https://evidenceforaction.org/blog-posts/what-weve-learned-about-approaches-community-engaged-research

Questions & Discussion

Any questions?

Challenges and successes that anyone would like to share/discuss?

Photo by Dominik Van Opdenbosch on Unsplash.com

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Case Discussion

Program Maturity ↔ Evaluation Needs

Program Start Up
- Community Needs
- Strategic Planning
- Program Design

Early Years
- What's working well, for whom?
- What needs adjustment?
- Early program successes

Mature Program
- Impact evaluation
- Success stories for grants, media
- Process eval to make refinements

Programs at an Early Stage

Is anyone at this stage?

What are the most important things you need to guide your program/services now?

What are the challenges you face where evaluation might help (but also feel hard to fit in)?

Mature Programs

Is anyone at this stage?

What are the most important things you need from evaluation right now?

Case Example – Mature Program

High Jump – educational program for academically advanced middle school students with socioeconomic needs to help launch them into better high schools and beyond

- Formative Youth experience assessments at program end points
  - Used staff input to create the experience assessments
  - Reviewed results with program team to assess what's working well and where improvements are needed
- Family Surveys to bring in additional input

References

Patton, M. Q. (1997). *Utilization-focused evaluation: The new century text* (3rd ed.). Sage Publications, Inc.

Eval Academy: https://www.evalacademy.com/resources/p/10-reasons-to-evaluate-infographic

The Bridgespan group: https://www.bridgespan.org/insights/nonprofit-organizational-effectiveness/a-practical-guide-to-nonprofit-measurement-evaluation-and-learning

Bitesize Learning: https://www.bitesizelearning.co.uk/resources/impact-vs-effort-matrix-explanation-template

WELCOME to

Stronger by Design: An ECHO for Practical Strategies to Evaluate and Amplify Impact

Session 2, Creating a Roadmap to Measure Success,
October 23, 2025

Center for Program Design & Evaluation
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Dartmouth Health

Project ECHO®

Session 2:
Creating a Roadmap to Measure Success

Catherine Denial, M.S.

Sidney May, Ph.D.

Nancy Boyer, Ph.D.

October 23, 2025

Today's Plan

Definition & importance of a logic model

Components of a logic model

Theory of change vs logic model

Using logic models in evaluation

Case study

Discussion

What is a logic model?

A **visual roadmap** of how your organization/program is supposed to work

A powerful **tool** for planning, implementing, managing, and evaluating an organization/program

Terms you might come across around logic models

- Theory of change
- Causal pathway
- Program roadmap
- Program model
- Conceptual framework

Photo by Taras Zaluzhnyi on Unsplash

The power of a logic model

Clarifies how and why your organization/program is supposed to work

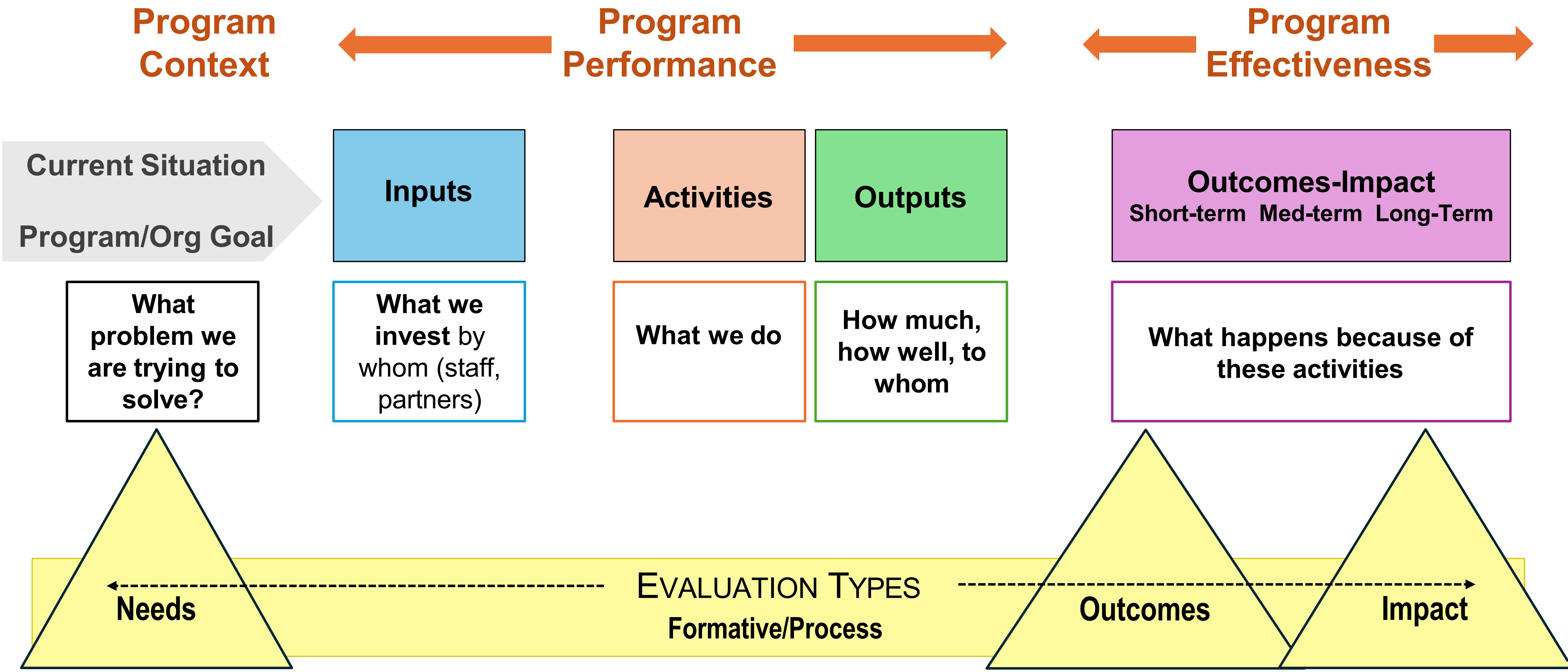
Provides a common language and shared understanding of purpose

Identifies what needs to be monitored and evaluated

Facilitates learning and **supports** evidence-based decision-making

Supports fundraising and grant writing

Your program roadmap (the logic model)



Adapted from learningforsustainability.net/evaluation-questions

Inputs: What we invest

Inputs

Staff, trained supervisors (incl. local staff)

Funding

Volunteers

Beneficiaries

Logistical tools (e.g., walkie talkies, internet access, vehicles)

Building materials (e.g., cement, wood, nails, drywall, mud, paint) and tools

Understanding of local disaster impact and community need

The resources a program has available to invest in the work

Include personnel, finances, technology, facilities, supplies

Consider contextual factors (structural or regulatory) that may impact inputs

What are the resources you need to operate your program?

Activities: What we do

Activities

Train volunteers in disaster-resilient construction techniques

Repair/Build homes (e.g., install foundation, build walls, frame roof, hang drywall, mud drywall, paint, install doors and trim, install flooring)

Monitor volunteer safety

Coordinate between beneficiary and organization

Document work

Participate in long-term response committees

What the program does with the resources

Includes processes, events, actions needed for program implementation

Might be considered the interventions or program strategies that are used to bring about the desired changes or results

What are your strategies or activities?

Outputs: How much, how well, and who you reach

Outputs

beneficiaries with safe, sanitary, and secure lodgings

houses built

volunteers trained

Rebuilt % of homes in XYZ neighborhood

Served XYZ types of beneficiaries

Direct products of program activities

Includes types, levels, and targets of services to be delivered

Tangible or observable manifestations of the intervention or program activities

What does your program produce and who do you reach?

Outcomes: What happens because of the activities

Outcomes

Short-term:

- Beneficiaries move back into home
- Volunteers gain practical skills in building/construction

Medium-term:

- Beneficiaries feel safe and secure in their home
- Reduction in housing costs (no longer pay for mortgage and rent)
- Volunteers recommend program to others & donate

Long-term:

- Housing security (fewer unhoused or temporary housing)
- Damage from future disasters is mitigated

Specific changes in program participants' behavior, knowledge, skills, status, and/or level of functioning

Can be broken down into short-term, medium-term, and long-term outcomes

What changes as a result of your program?
How do you distinguish between short, medium, and long-term outcomes?

Theory of Change

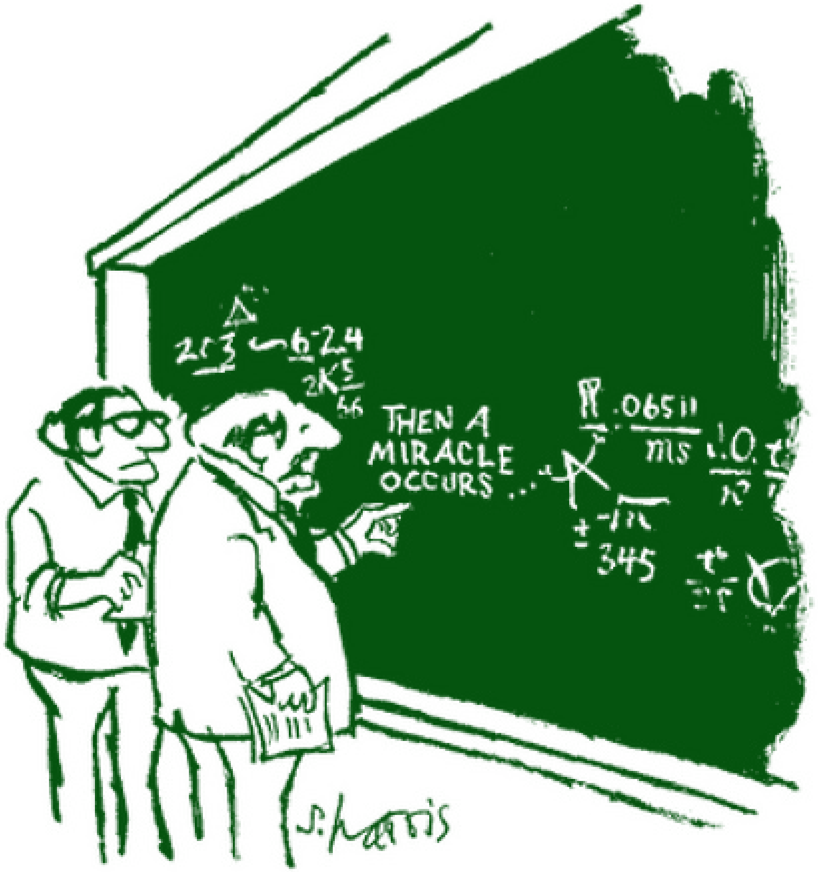
The logic model which provides the **“what” and “how”** of a program

The theory of change provides the **“why”** the program or activities work to achieve the outcomes

Explains **why we expect the changes to occur** - connecting why certain activities result in certain outcomes

Underlying assumptions of how your program works that can be tested and measured

Developed from prior research or evaluation on similar programs, expert opinion, perspectives of staff, managers, partners and community members about how the intervention works, and research-based theories



“I think you should be more explicit here in step two.”

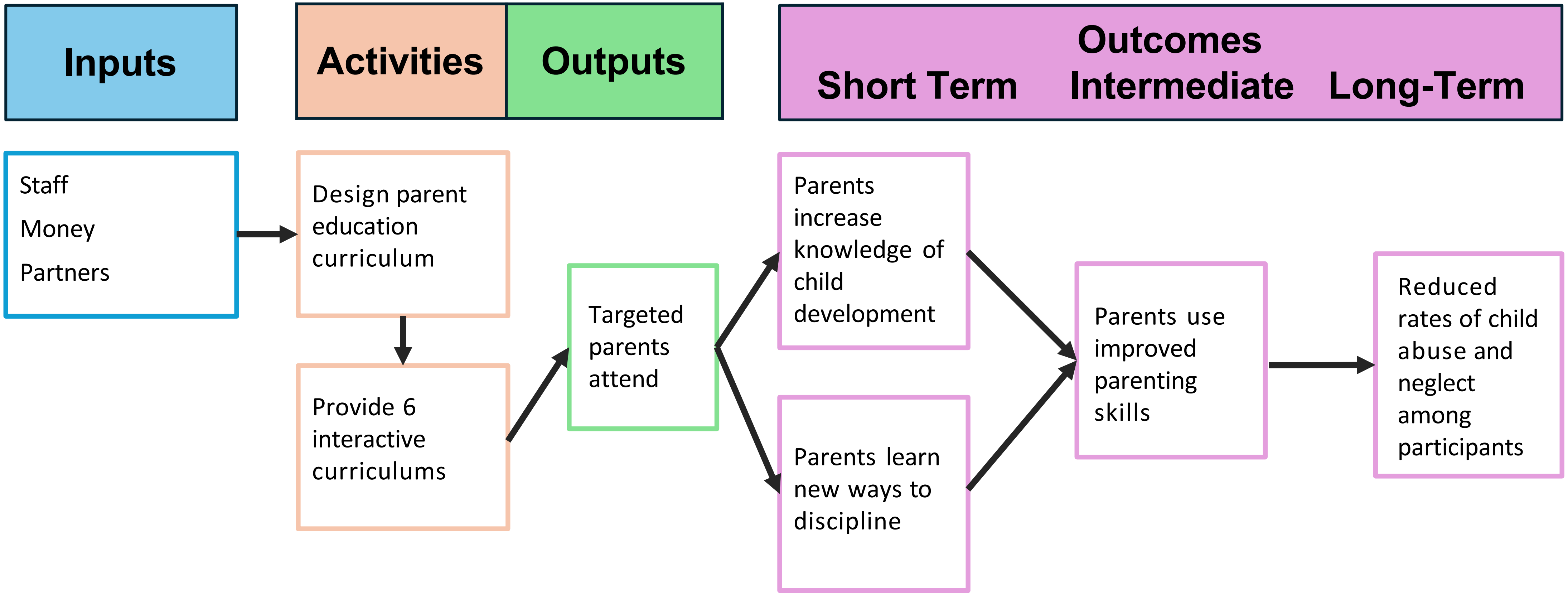
Example: Community Food Access Program

Inputs	Activities	Outputs	Outcomes
Staff (ED, Development, and Admin)	Establish weekly farmers market	50 weekly markets held annually	Short-term • 75% awareness of local produce • 60% increased food prep knowledge • 40% increase in SNAP produce
Community foundation funding	Implement SNAP/EBT payment system	25 vendors participating regularly	
Local farmer partnerships	Create/distribute multilingual information	2,000 customer visits recorded	Medium-term • 50% shop monthly • 65% increased produce consumption
Donated community center space	Offer hands-on cooking classes and demonstrations	500 SNAP/EBT transactions processed	
Core volunteers		24 cooking demonstrations, 100 unique participants	Long-term • Food access difficulty reduced by 25% • 15% fewer ER visits for diet-related issues
Refrigeration equipment			

Goal Improved food security, nutrition, and health outcomes through sustainable, community-driven food systems change

Adapted from https://unlock-grants.com/blog/logic-model/#post/0

Example 2: Parent Education



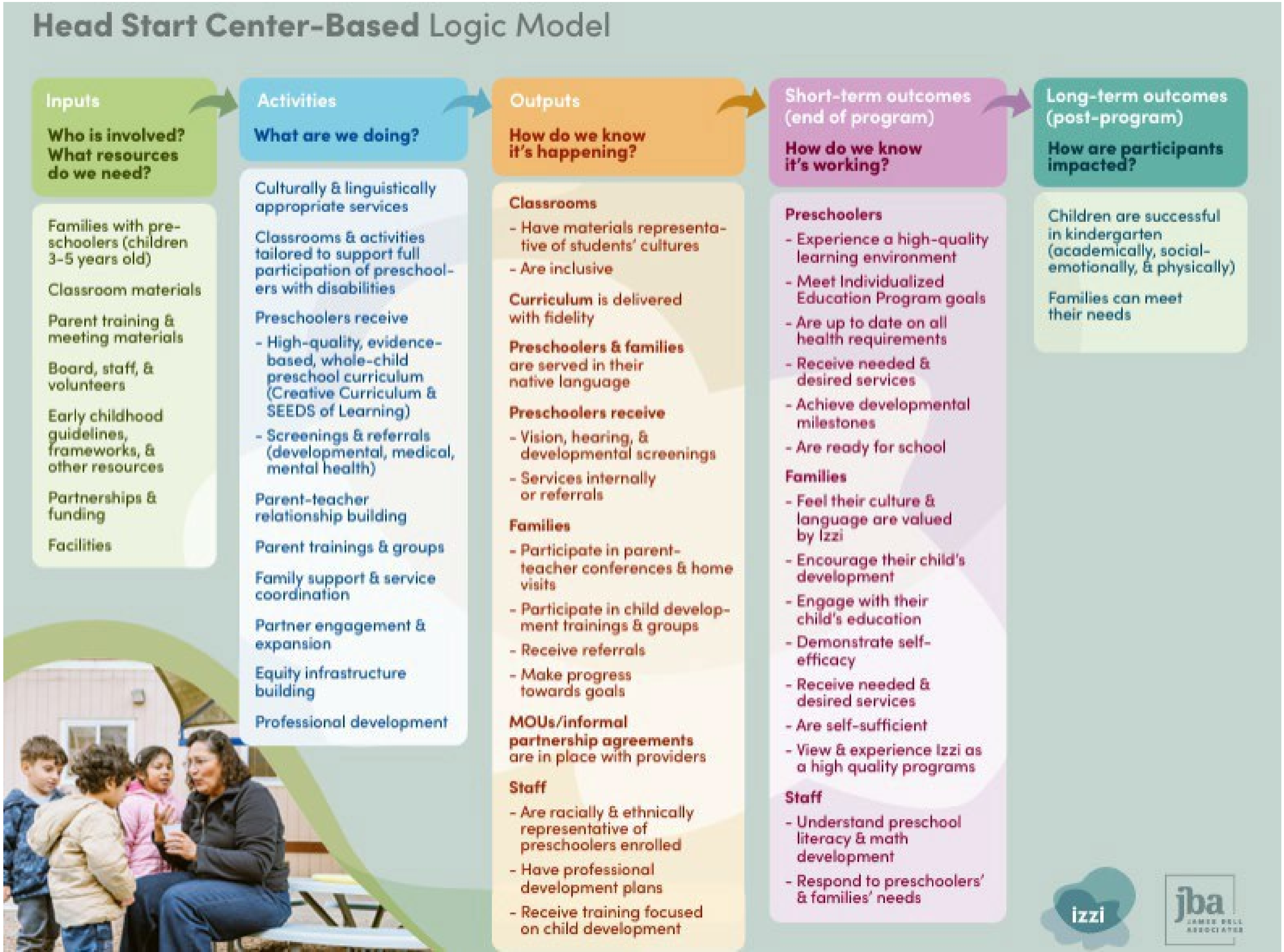
Adapted from University of WI Cooperative Extension

Sample logic model

Izzi Early Education Logic Model

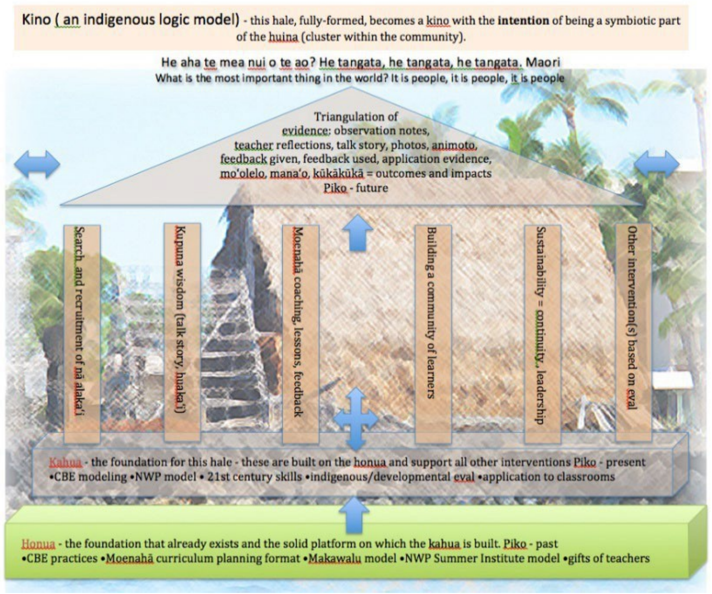
Izzy Early Education provides comprehensive child development support and services to families in the San Francisco Bay Area

https://www.jbassoc.com/resource/izzi-early-education-logic-models/



Alternate Formats

- Edit based on the unique needs of your audience
- Maintain the same basic building blocks (e.g., inputs, activities, outputs, outcomes)
- Formats can adapt to different understandings of theory and logic



http://puremanao.blogspot.com/2012/07/kino-indigenous-logic-model-post-1-of-4.html

Colorado Violence and Injury Prevention Network
ciac.colorado.gov/files/D2DF/CO%20Violence%20and%20Injury%20Prevention%20-%20Mental%20Health%20Promotion%20Strategic%20Plan%202016-2020_CDPHE.pdf

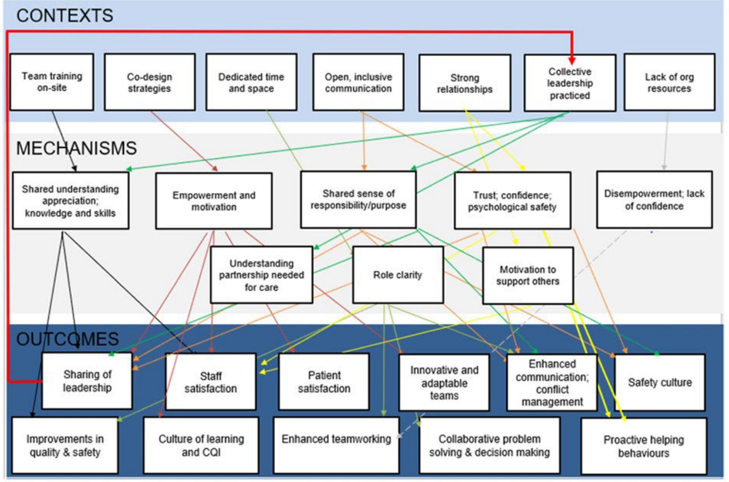
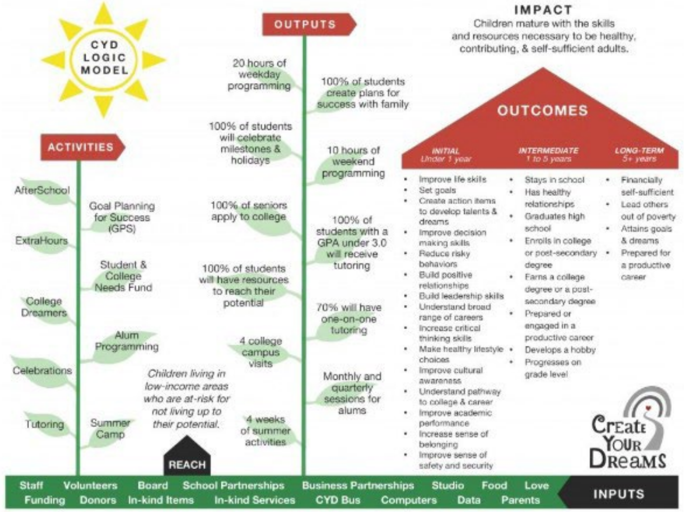
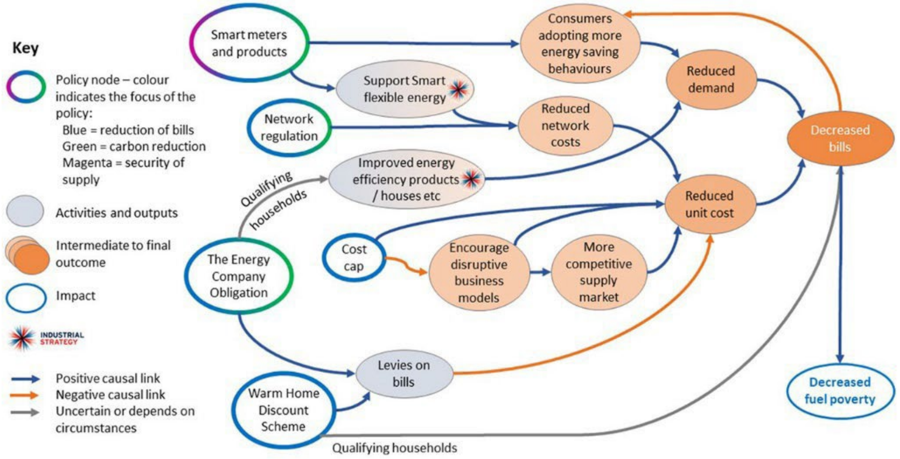


Fig. 1 Initial Programme Theory for collective leadership, depicting context-mechanism-outcome configuration

https://bmchealthservres.biomedcentral.com/articles/10.1186/s12913-020-05129-1

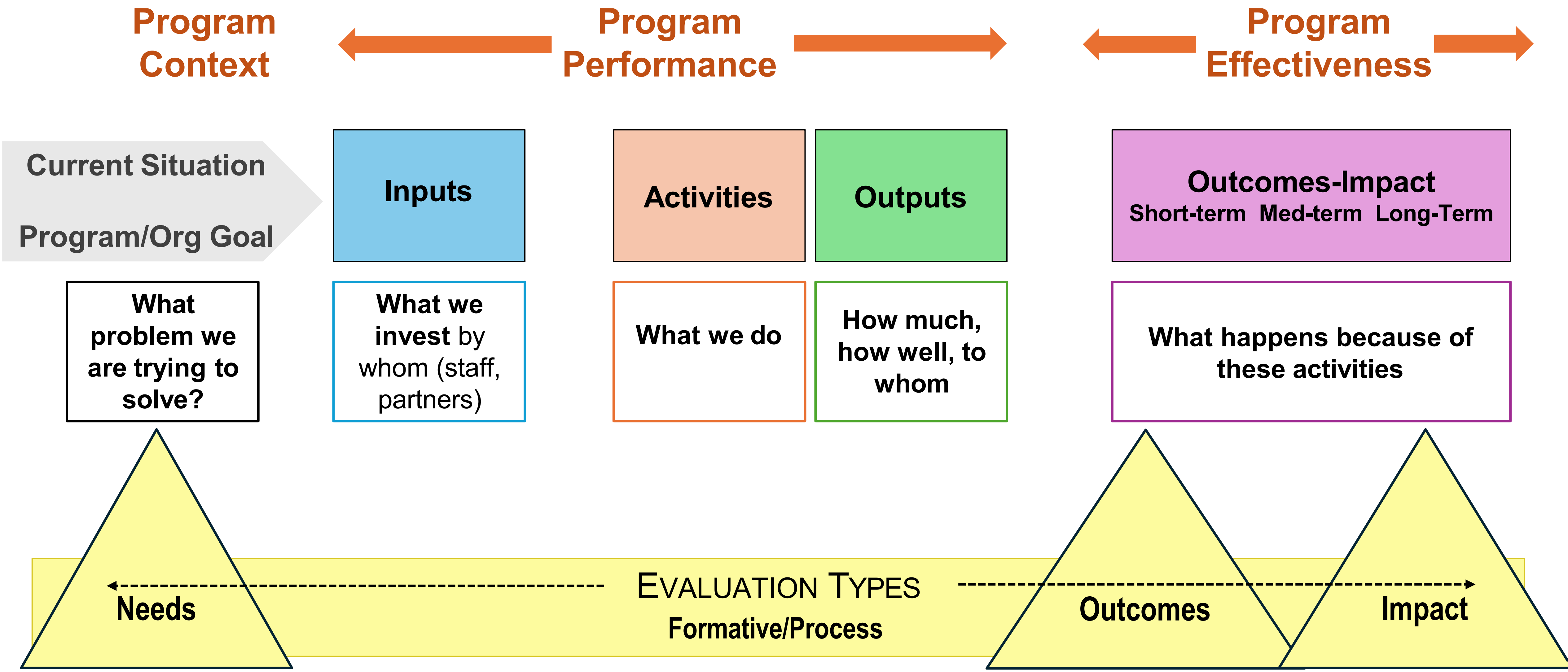


https://www.bonterratech.com/blog/logic-models-and-fundraising



Wilkinson, H., Hills, D., Penn, A., & Barbrook-Johnson, P. (2021). Building a system-based Theory of Change using Participatory Systems Mapping. Evaluation, 27(1), 80–101. https://doi.org/10.1177/1356389020980493

Evaluation is part of your program roadmap

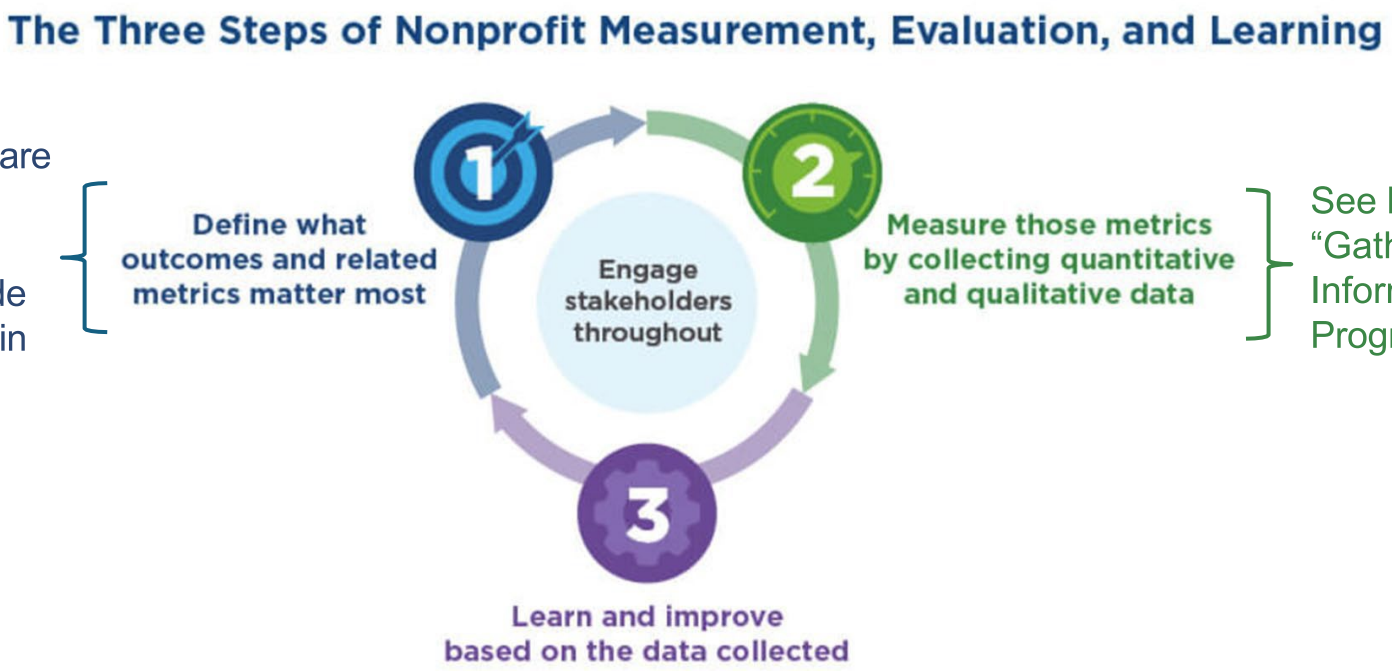


Adapted from learningforsustainability.net/evaluation-questions

Using logic models in evaluation

What evaluation questions are you trying to answer?

Your logic model will provide the key areas to measure in an evaluation.



See ECHO Session 4 for "Gathering Data and Information about Your Program"

The outcome of the evaluation may confirm the logic model or suggest changes. **Evaluation is ongoing.**

See ECHO Session 5 for "Making Sense of Data"

Case Study

Case Study (see handout)

Blue Sky Works (BSW) is a small nonprofit located in Manchester, NH

Their mission is ensuring that young adults have the skills, experiences, and support to achieve their full potential in their careers. The organization **aims to increase the career stability of low-income young adults** by providing them with **hands-on skill development in technology, career coaching, and job placement**.

The program has a **budget of $400,000, 5 full time staff, 10 part time volunteers**, and serves **150 low-income young adults age 18-25 annually**. The organization receives **in-kind donations** and multiple small-moderate size **grants from local businesses and foundations**.

BSW started in 2018 and is well-respected in the local community. **Referrals** to the program come from local high schools, city and state agencies, social service agencies, and word of mouth.

The leaders of BSWs know they do good work, but they don't know how to demonstrate it. They rely on **exit surveys** that provide little useful feedback, are often incomplete and have low response rates. They rely on anecdotes **and enrollment numbers** to show "impact".

The organization wants to apply for more substantial funding to grow their program and reach more participants, moving from local to state-wide and multi state access. In their attempt to go after larger funding opportunities they find it difficult to provide strong answers to questions covering the organization goals, reach, outcomes, measurement of outcomes, results, and how they use results to inform program improvement.

The board of directors is getting impatient with the staff not being able to bring in more funds and increase their reach and expand their programs. Staff are frustrated because they see the impact they are making but cannot articulate it in a way to get funders to pay attention.

Where do they start?

Example:

Goal: The organization aims to increase career stability for low-income young adults.

	Inputs	Activities	Outputs	Outcomes-Impact Short-term Med-term Long-Term
What problem are you trying to solve?	What we invest by whom (staff, partners)	What we do	How much, how well, to whom	What happens because of these activities
Young adults lack job opportunities in their community.	Staff Volunteers Funding Board of directors Technology supplies Curriculum Community relationships Physical space for training	Conduct 8-week technology training course Career coaching Job placement	150 low-income young adults age 18-25 complete program annually 4 program sessions annually	Short-term: Participants develop marketable technology skills, gain job search skills, confidence Participants get jobs in their trained field Medium-term: Participants progress in their careers (job growth, promotion, salary increases) Long-term: Participants have financially stability Community has more economic stability

Discussion and Questions

References

James Bell Associates. (2007). *Evaluation Brief: Developing a Logic Model*. Arlington, VA. August 2007

Kellogg Foundation Logic Model Development Guide: https://www.naccho.org/uploads/downloadable-resources/Programs/Public-Health-Infrastructure/KelloggLogicModelGuide_161122_162808.pdf

University of Wisconsin – Cooperative Extension: http://www.uwex.edu/ces/pdande/evaluation/evallogicmodel.html

Better Evaluation: https://www.betterevaluation.org/blog/using-logic-models-theories-change-better-evaluation

CDC: Evaluation framework: https://www.cdc.gov/evaluation/php/evaluation-framework-action-guide/index.html and logic model: https://www.cdc.gov/evaluation/php/evaluation-framework-action-guide/step-2-describe-the-program.html

Up Next

- Next session: November 6th, From Theory to Practice: Hands-on Evaluation Planning Workshop
- Please submit your cases/questions and view course resources at the: DH iECHO site
- Recordings will be posted on the D-H ECHO website https://www.dartmouth-hitchcock.org/project-echo/enduring-echo-materials

Appendix

Additional Information and Examples

Situation, goals, & assumptions

Situation/problem: Before creating your logic model, you should write a “problem statement” or summary of the situation or problem your program is trying to address. Consider:

- What is known about the problem and solutions?
- Who is affected?
- What can be changed?
- Why does the problem exist?

Goal(s): Next, articulate the goals of the program (or organization, intervention). A goal is a broad, high-level statement that describes the long-term change you aim to achieve in response to the problem. Goals are directly informed by the problem statement and **serve as the foundation for identifying desired outcomes and ultimate impact.**

Assumptions: Beliefs we have about the program, participants, how the program will work. They include:

- Our definition of the existing problem and solution
- How the program will operate
- What we expect to see for outcomes
- What we know or think about participants including behavior and motivations
- External environment and context and how it influences the program and outcomes

Outcomes: What happens because of the activities

Specific changes (short, medium, long term) in program participants' behavior, knowledge, skills, status, and/or level of functioning.

Here is one option for thinking about the difference between short-, intermediate, and long-term outcomes:

OUTCOMES		
Short-Term	**Medium**	**Long-Term**
Changes in awareness, knowledge, attitudes, skills, opinions, motivations, behavioral intent	Changes in behavior, decision making, policies, action	Changes in conditions, social, health, economic, environmental, community level
Parental awareness of health requirements	Parent/child completes well-child visits annually	Access to health care Improved health outcomes

Theory of Change

The logic model which provides the “what” and “how” of a program

A theory of change provides the “why” the program or activities work to achieve the outcomes

Explains how the change will occur – connecting why certain activities result in certain outcomes

Underlying assumptions of how your program works that can be tested and measured

The theory of change can be developed from prior research or evaluation on similar programs, expert opinion, perspectives of staff, managers, partners and community members about how the intervention works, and research-based theories

Example: Simple Theory of Change

Our Build It! robotics program is designed to increase student interest in science, technology, engineering and math and give students experiences to build their confidence, problem solving and critical thinking skills. It is a 10 week after school robotics program.

Strategies used in our program…	That research indicates…	Leads to these outcomes
Students learn about programming, design, and engineering by building a robot from a kit of parts	Learning by doing through hands-on projects that are relevant and meaningful drive interest	Interest in STEM
Students work on teams to design and build their robot, guided by mentors	When adults serve as mentors but let students try and fail on their own, students build confidence; working on teams supports problem solving, collaboration, critical thinking	Increase confidence
Teams showcase their robots at a competition	Activities that end in a project where they interact with peers doing similar work, compete, or showcase supports confidence and interest	Increase problem solving, critical thinking

Logic Model Template

Program Goals:
Assumptions:

	Inputs	Activities	Outputs	Outcomes-Impact Short-term Med-term Long-Term
What problem are you trying to solve?	**What we invest** by whom (staff, partners)	**What we do**	**How much, how well, to whom**	**What happens because of these activities**

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https://geiselmed.dartmouth.edu/cpde/

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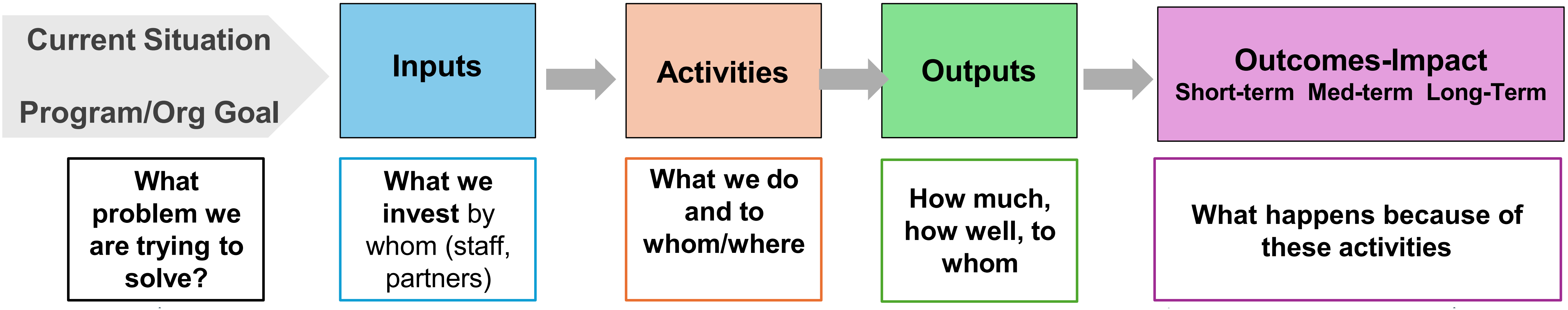
Session 3:
From Theory to Practice: Hands-on evaluation planning workshop

Rebecca Butcher, MS, MPH

11.6.2025

Creating a Program Logic Model → Theory of Change



The logic model describes the **"what" and "how"** of a program

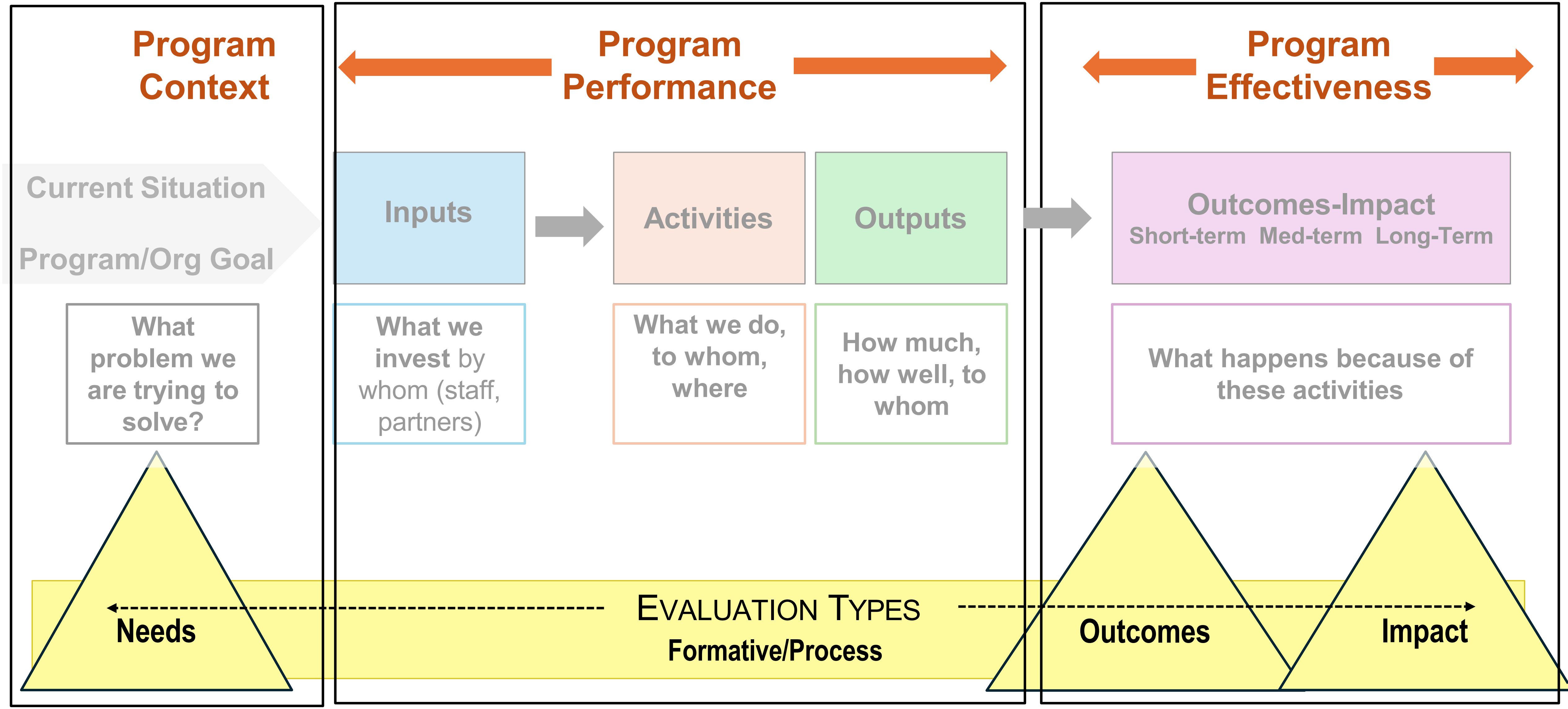
The theory of change is **"why" we expect the changes to occur** – our assumptions or past evidence that certain activities will result in certain outcomes

EVALUATION TYPES

Formative/Process **Outcomes** **Impact**

Adapted from learningforsustainability.net/evaluation-questions

What are the Priorities for Evaluation?

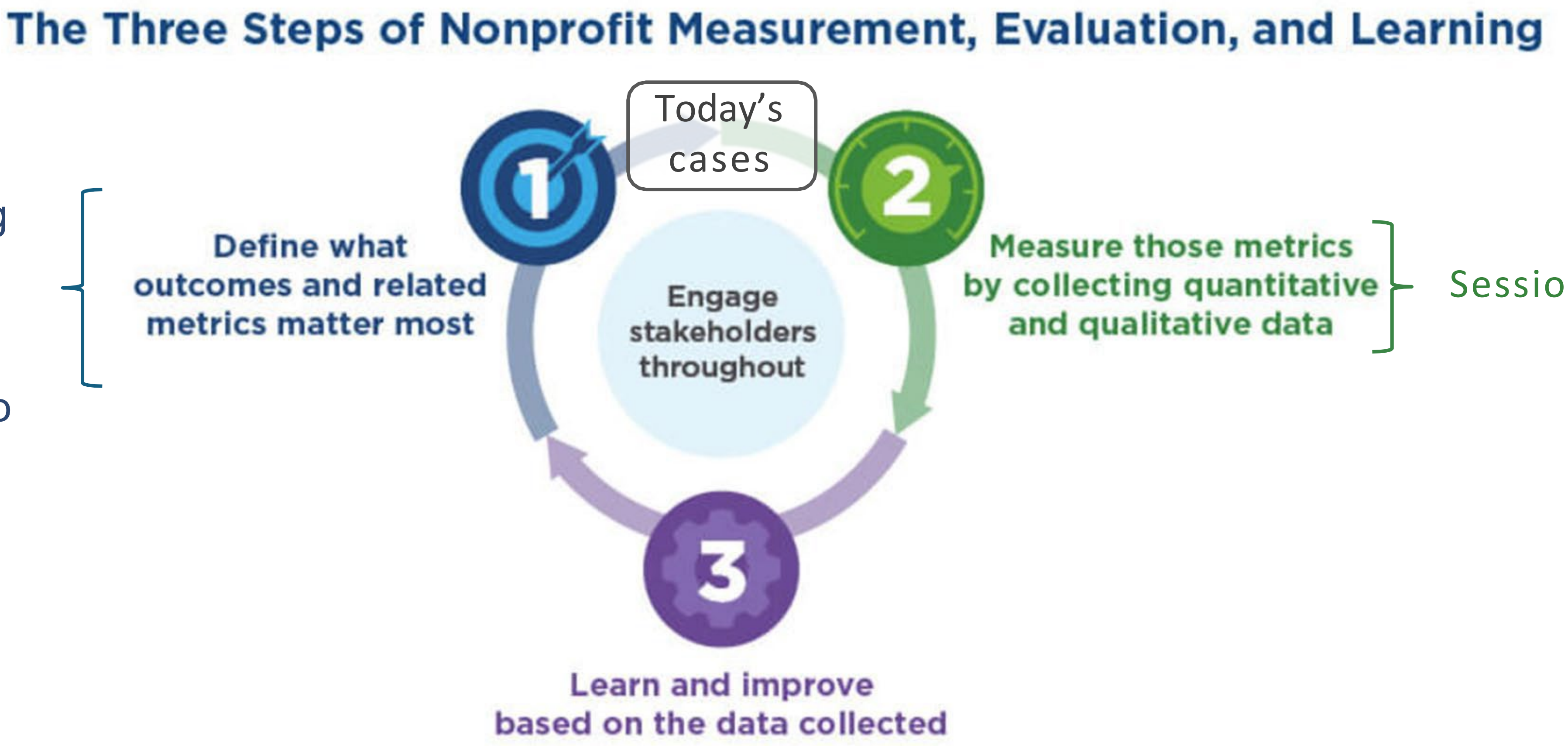


Adapted from learningforsustainability.net/evaluation-questions

Using logic models in evaluation

What evaluation questions are you trying to answer?

Your **logic model** will provide the key areas to measure in an evaluation.



Session 4

Session 5 & 6

Case Examples

Keene Public Library

Marti Fiske, Library Director

- Done well collecting quantitative information (e.g., number of items loaned, attendance at programs, etc.)
- Struggling with how to collect long-term impacts – past surveys done immediately after an event, so only capture what people *think* they'll be interested in pursuing, not what they truly followed up on.
- We get anecdotal feedback from frequent visitors, and when someone is particularly excited about something.
- Our main questions at this time:
    1. What happens after using our services?
    2. What are the long-term impacts or benefits to people from utilizing our public library?

How can we collect information on the long-term benefits of using our services? Surveys have notoriously low return rates, "good" questions are difficult to create, and people may not know or share how they are influenced.

Case Discussion

What could Marti and her team do next…

…to clarify outcomes of greatest interest?

…to identify potential data sources & measures?

Keene Public Library Logic Model

Inputs	Activities	Outputs	Outcomes-Impact Short-term Med-term Long-Term
What we invest	**What we do, to whom**	**How much, how well, to whom**	**What happens because of these activities**
Knowledgeable Director and staff Technology/Web access & expertise State of NH Library System resources Town funding & fees Physical space & programming rooms	Book & media loans Lap sit / early reading groups Youth / Teen programs Senior programs Community events with other co-sponsors IT/Search support	# of books, videos, etc. loaned # of programs offered to x, y, z groups # of community events co-sponsored # of tech support sessions # of Inter library loans # of genealogy / specialty searches done	**What are KPL's desired outcomes?** **What would long term impact look like for KPL?**

Generating Evaluation Questions from the Logic Model

Inputs

- Knowledgeable Director and staff
- Technology/Web access & expertise
- State of NH Library System resources
- Town funding & fees
- Physical space & programming rooms

Activities

- Book & media loans
- Lap sit / early reading groups
- Youth / Teen programs
- Senior programs
- Community events with other co-sponsors
- IT/Search support

Outputs

- # of books, videos, etc. loaned
- # of programs offered to x, y, z groups
- # of community events co-sponsored
- # of tech support sessions
- # of Inter library loans
- # of genealogy / specialty searches done

Outcomes-Impact

Short (2-5 yrs)

Long (7-10 yrs)

Key Evaluation Questions

Outputs:

How many people use our programs?
-What ages, groups?
-Repeat patrons?

What services, programs are used the most?
-By whom?

Short (2-5 yrs):

What do patrons like most about library offerings?

What is the value-add that KPL brings to Keene?

Long (7-10 yrs):

How many voters support KPL funding and infrastructure projects?

What investments have been made to KPL in last 10 years?

Questions → Methods & Data

What do patrons like most about library offerings?

What is the value-add that KPL brings to Keene?

Outcomes

Ideas?

How many voters support KPL funding and infrastructure projects?

What investments have been made to KPL in last 10 years?

Impacts

Ideas?

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DH Value Institute Learning Center

Vicky Adams, Principal Performance Improvement Consultant, DHMC

What we do and data currently collected

- number of students that we train and certify
- student feedback for every class we teach to assess where program improvement is needed
- projects that are executed (mostly Yellow belt for certification)
- data about Idea Board implementation and usage

Challenges

- Difficult to quantify the dollar value of the work or other ”hard measures” due to lack of data
- Engagement scores may reflect value of the training but lack feedback about skills with CQI
- Engagement of high-level leaders in training is sparse

Evaluation Questions

What and how can we measure the impact of the training and project execution on the organization and system given the noted constraints (lack of data, limited leader engagement)?

How do we help high level leaders understand the value of the program and participate in training?

Case Discussion

What could Vicky and her team do next…

…to identify impacts at the level of the organization?

…to identify potential data sources & measures?

…to engage leaders in the program?

Current situation or goal	Inputs	Activities	Outputs	Outcomes/Impact Short, Med, Long term
What problem are we trying to solve?	What we invest by whom - resources (staff, partners)	What we do	How much, how well, to whom	What happens because of these activities
Increase capability and capacity for improvement work	-Blackbelts -Specialist (coordination & support) -Curriculum -Space -Tech -Tools & templates -The Book (LSS Guide for Improving HC) -PI staff training & education	-Curriculum planning, accreditation, scheduling, communication, marketing, recruitment LT, YB, GB, E2Ws, L@DH -Class delivery -Coaching -Curriculum creation & revision -Document and track training & cert -Track projects -Idea board support -Recognition: --LPMR, GB, YB cert --SES planning, recruitment, delivery -Data collection & analysis of programs -Partner w/LLD -Present PI work (internal & external)	# classes scheduled & accredited, # students registered/attend -Avg # Trained/Yr YB 274,GB 32, E2W 180, LT 49 -Avg # Certified/Yr YB 70, GB 82% -Class eval/feedback -Coaching hours: 82 - # Idea boards provisioned, education -Recognition for staff & consultants - # SES presentations - # SES attendees - # External presentations	**Short:** -Program improvement -Improvement initiatives & projects -Employee ideas for improvement -Employee engagement -Sharing of CI work -Internal & external recognition **Medium:** -Larger projects -Relationships between practitioners **Long:** -Meet strategic goals -Employee development -External PI expertise recognition

DRAFT MODEL

Learning Center's Theory of Change

What do you hope to achieve?

We invest these Resources

and do these Activities

Trainings in CQI

LEAN Certifications

CQI Projects

Idea Board implem.

XXXX

yielding these Results

employees trained

Certifications rec'd

CQI projects; Types

[#/amt] Idea Board use

Depts with QI projects

Other results/outputs?

and achieving Outcomes & Impacts

Staff: Trained staff participate in projects; Certified staff lead CQI

Depts: all units do at least 1 CQI project/year with >50% staff participating; All supervisors have Yellow Belt training; units achieve high quality, efficiency

Org/System: leaders talk up CQI projects & results; invest funds in CQI; culture changes; DH-H 5-star ratings

Target Outcomes & Impact → Measures

<u>Staff</u>: Trained staff participate in projects; Certified staff lead CQI → Ideas?

<u>Depts</u>: all units do at least 1 CQI project/year with >50% staff participating; All supervisors have Yellow Belt training; units achieve high quality, efficiency → Ideas?

<u>Org/System</u>: leaders talk up CQI projects & results; invest funds in CQI; culture changes; DH-H 5-star ratings → Ideas?

Questions & Discussion

Challenges and successes that anyone would like to share/discuss?

Photo by Dominik Van Opdenbosch on Unsplash.com

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Project ECHO®

Session 4:
Gathering Data and Information about Your Program

Laura Bernstein, Ph.D.

Erin Knight-Zhang, Ph.D.

Sidney May, Ph.D.

November 20, 2025

Today’s Plan

Developing your data collection strategy

Understanding different types of data

How to collect new data

Tips for using survey platforms

Survey best practices

Case study

Recap

Program Context | **Program Performance** | **Program Effectiveness**

Current Situation

Program/Org Goal

What problem we are trying to solve?

Inputs

What we invest by whom (staff, partners)

Activities

What we do

Outputs

How much, how well, to whom

Outcomes-Impact

Short-term Med-term Long-Term

What happens because of these activities

Needs

EVALUATION TYPES

Formative/Process

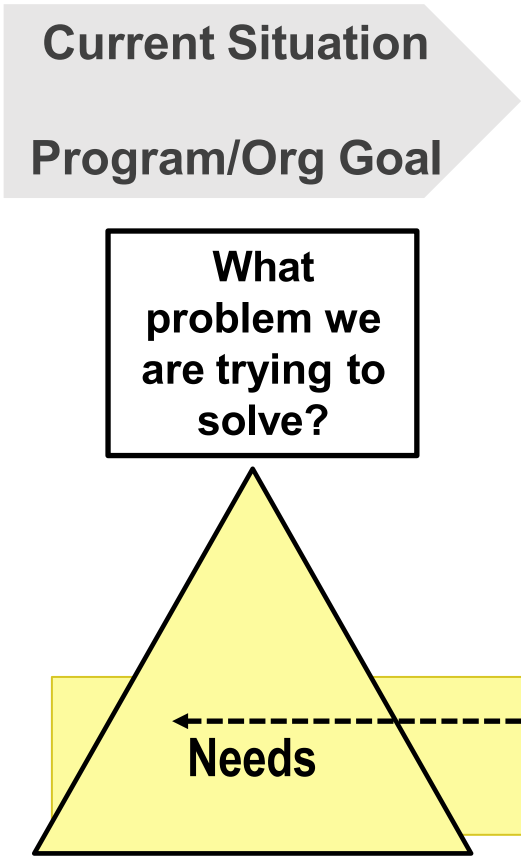
Outcomes

Impact

Adapted from learningforsustainability.net/evaluation-questions

Needs Evaluation

Program Context



“ What are the most pressing issues or challenges currently facing our community?

“ What services or resources are currently lacking or underprovided in the community?

“ Which groups of people are most affected by the discrepancy between what is and what should be?

Formative/Process Evaluation

Program Performance

Inputs

Activities

Outputs

What we invest by whom (staff, partners)

What we do

How much, how well, to whom

EVALUATION TYPES

Formative/Process

"

To what extent is the program being implemented as intended?

"

What aspects of the implementation process are facilitating success or acting as barriers?

"

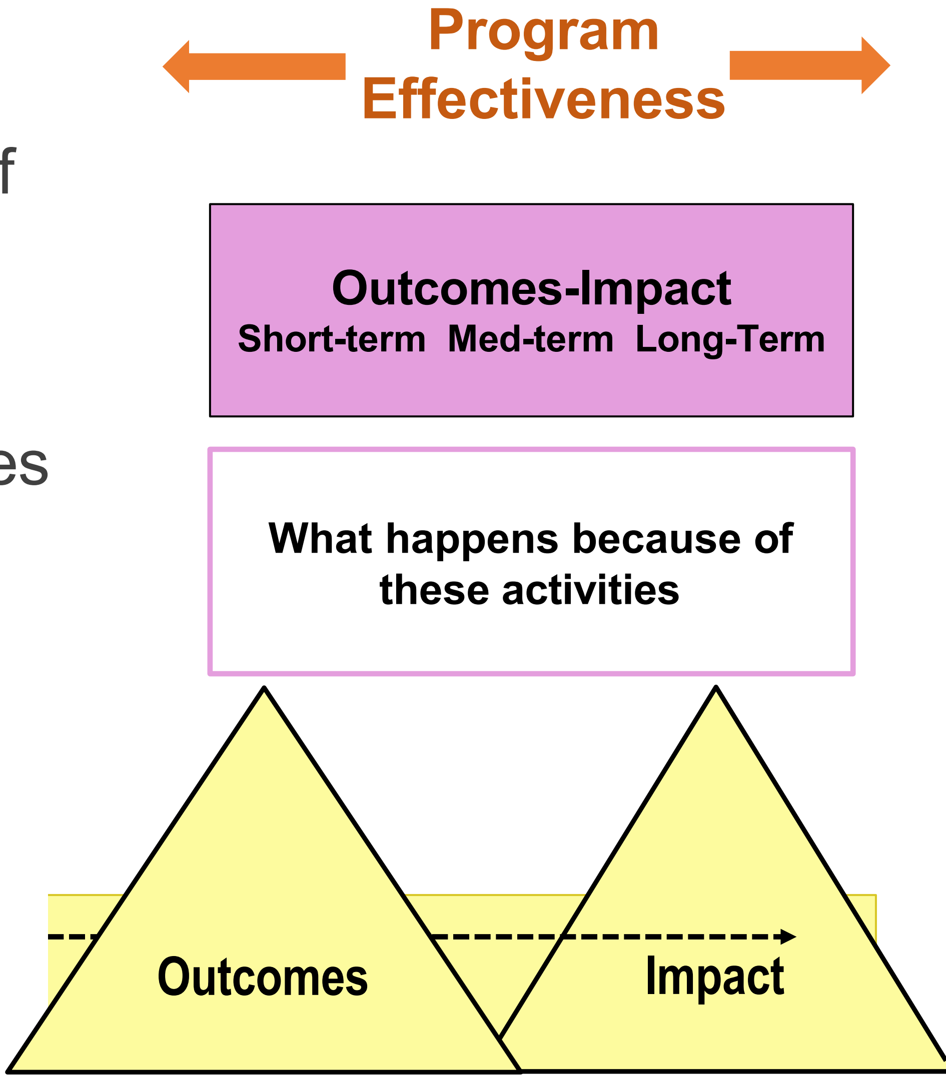
To what extent is the program serving the intended participants?

Outcomes & Impact (Summative) Evaluation

"What difference did this program make in the lives of the individuals who participated in it?

"What long-term changes occurred in participants' lives (employment, education, housing stability, etc.)?

"To what extent did the program meet its stated objectives?



Adapted from learningforsustainability.net/evaluation-questions

Aligning your evaluation goals with your data collection strategy

This is based on your logic model and evaluation questions

Developing your data collection strategy – BSW Continued

Project ECHO

	Activity		Output	Short-Term Outcome	Medium-Term Outcome	Long-Term Outcome
Theory of Change	Conduct 8-week technology training course		150 low-income young adults aged 18-25 complete program annually	Increased tech skills & knowledge	Well-matched job placements upon completion of program	Job stability Career progression Financial stability
Eval Qs	Process: To what extent are trainings being implemented as planned? If not, why?	Process: What are participants' perceptions of their experience?	Process: What are facilitators & barriers to reaching the 150 annual target?	Outcome: How effective is the program at improving relevant skills & knowledge?	Outcome: How effective is the program at placing participants in jobs matched to skills?	Outcome: How effective is the program at improving career and financial stability?
Data Collection Strategy (Methods)	Fidelity monitoring using **quant data** (e.g., assessment) and/or **qual data** (e.g., observations)	**Quant data** (e.g., surveys) and/or **qual data** (e.g., interviews; focus groups)	**Quant data** (e.g., surveys) and/or **qual data** (e.g., interviews; focus groups)	**Quant data** (e.g., pre-post surveys) and/or **qual data** (e.g., interviews; focus groups)	**Quant data** (e.g., alumni survey; LinkedIn) and/or **qual data** (e.g., interviews with alum)	**Quant data** (e.g., retention metrics over time from; LinkedIn; salary metrics from Glassdoor or survey)

Another data collection strategy format

Logic Model Component	Metrics	KPIs	Targets	Data Sources
Short-term outcome: Increased tech skills & knowledge	Pre- and post-program assessment scores	Average percent increase in assessment scores	**90%** of participants demonstrate improved technical skills and knowledge	Pre- and post-skill/knowledge assessments
Medium-term outcome: Well-matched job placements upon completion of program	Employment rates	% of graduates employed in positions aligned with their training and skillsets within three months of completion	**At least 80%** of participants secure employment in positions aligned with their training and skillsets within three months of completion	LinkedIn

Another data collection strategy format

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Primary (Active) Data Collection

Secondary (Passive) Data Collection

Types of Data Collection

	Primary (Active) Data Collection	Secondary (Passive) Data Collection
Definition	New or “original” data collected directly by you for a specific purpose	Data collected by others for some different, initial purpose (e.g., as part of regular operations)
Resources	Can be time- and resource-intensive to collect data	Can be economical and fast to access previously-collected data
Validity & Reliability	Depending on questions, can be more accurate and reliable because the data are specific to you needs	Could be relatively less accurate and reliable because data may or may not be specific to your needs
Example Sources	Surveys, assessments, focus groups, interviews, observations, case studies, photo journals, journal entries	Document or record reviews, webpage traffic, meeting notes, LinkedIn, Glassdoor, Administrative data (e.g., GPAs; classroom attendance)

Types of Data Collection

Example Sources

Surveys, assessments, focus groups, interviews, observations, case studies, photo journals, journal entries

Document or record reviews, meeting notes, webpage traffic, LinkedIn, Glassdoor, Administrative data (e.g., GPAs; classroom attendance)

Types of Data Collection

Quantitative: Numeric (numbers-based; countable)

Answers "how much/many/often" and "to what extent" questions

Example Sources

Surveys, assessments, focus groups, interviews, observations, case studies, photo journals, journal entries

Document or record reviews, meeting notes, webpage traffic, LinkedIn, Glassdoor, Administrative data (e.g., GPAs; classroom attendance)

Types of Data Collection

Quantitative: Numeric (numbers-based; countable)

Answers "how much/many/often" and "to what extent" questions

Qualitative: Non-numerical (descriptive)

Answers "how" and "why" questions

Example Sources

Surveys, assessments, focus groups, interviews, observations, case studies, photo journals, journal entries

Document or record reviews, meeting notes, webpage traffic, LinkedIn, Glassdoor, Administrative data (e.g., GPAs; classroom attendance)

Types of Data Collection

Quantitative: Numeric (numbers-based; countable)

Answers “how much/many/often” and “to what extent” questions

Mixed Methods: The combination and integration of both quantitative and qualitative data

Qualitative: Non-numerical (descriptive)

Answers “how” and “why” questions

Example Sources

Surveys, assessments, focus groups, interviews, observations, case studies, photo journals, journal entries

Document or record reviews, meeting notes, webpage traffic, LinkedIn, Glassdoor, Administrative data (e.g., GPAs; classroom attendance)

Understanding what can’t be captured easily

Some long-term impact statements

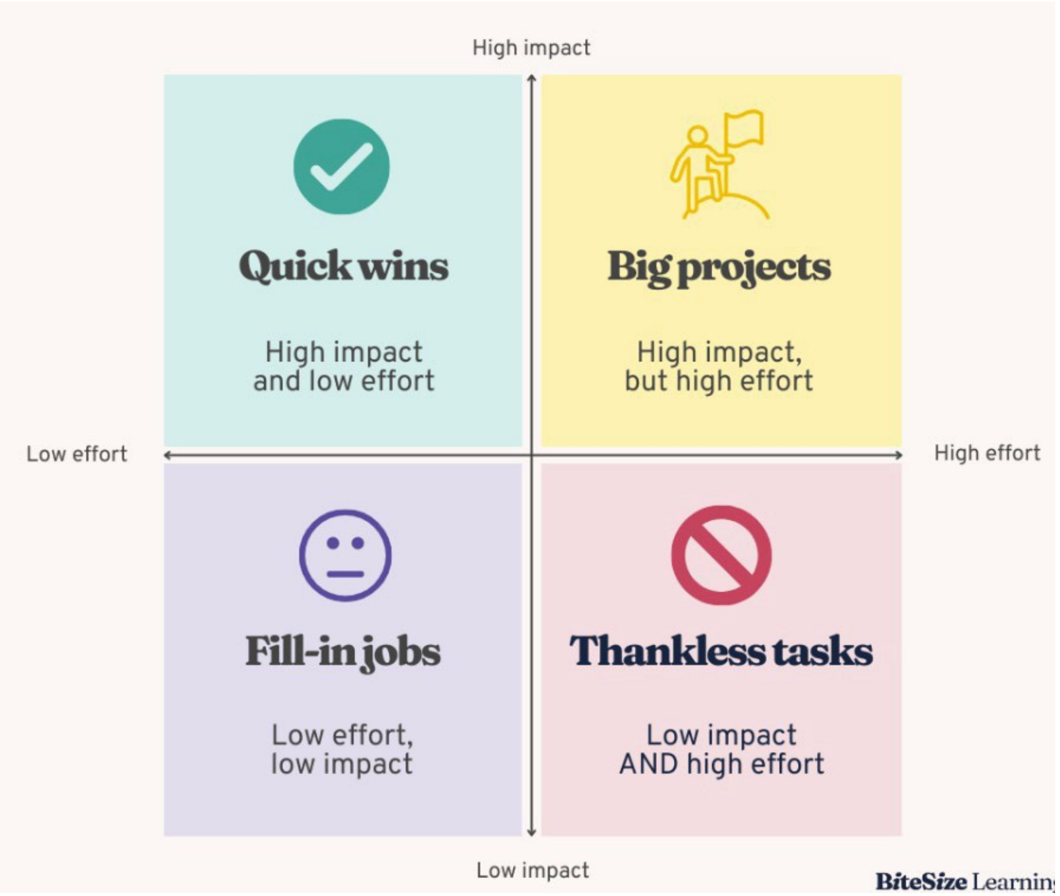
Limitations due to staff/participant burden

Limitations due to time/resources

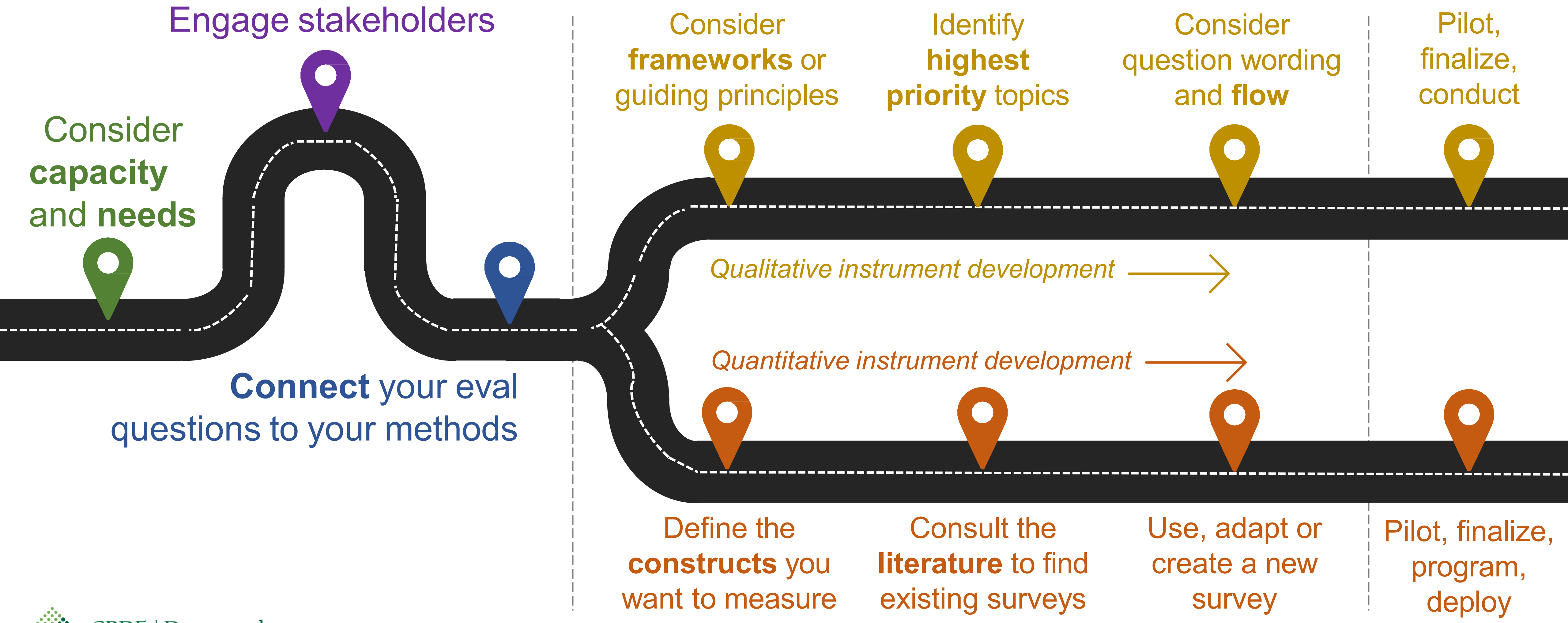
Regularly ask yourself:

“How will this data be used?”

“What purpose does it serve?”



Collecting primary or new data



Collecting primary or new data

Eng

Consider **capacity** and **needs**

questio

Is it necessary to collect new data, or can you answer questions with existing/secondary data? How will you use this data?

What are your time and budget constraints?

- **Multi-step process** can take days/months
- **Budget considerations**: personnel, tools required, incentives

Are participants readily available, or do you need to recruit them? What is your capacity to recruit participants?

- Tendency to **overestimate** ability to recruit
- Consider how you will get in touch, **response rates,** motivation for participants

Pilot, alize, nduct

constructs you want to measure

literature to find existing surveys

create a new survey

, finalize, program, deploy

Collecting primary or new data

Engage stakeholders

Consider **capacity** and **needs**

Connect your eval questions to your methods

Pilot, finalize, conduct

Consult on needs, determine approach, etc.

constructs you want to measure

literature to find existing surveys

create a new survey

lot, finalize, program, deploy

Collecting primary or new data

Engage stakeholders

Consider **capacity** and **needs**

Connect your eval questions to your methods

Are your evaluation questions best answered through quantitative data, qualitative data, or a mix of both (time permitting)?

Quantitative	Qualitative
Purposes Quantifying, prediction, generalizability, identify patterns and relationships	**Purposes** Contextualization, interpretation, understanding perspectives
Uses Answer “how much/many/often” and “to what extent” questions	**Uses** “Answer “why” and “how” questions, providing ”richer” and “deeper” data
Example Questions *How satisfied* are participants with the program? *To what extent* are X and Y related?	**Example Questions** What are barriers and facilitators to access and *how* do they impact X? *Why* are participants not satisfied?

want to measure existing surveys survey deploy

Collecting primary or new data

For **quantitative** instruments…

Look for something that is already developed using a **literature search**

Determine which instruments are "**good**"

Determine your **access** to the instrument

If nothing exists, consider **adapting** or **creating** an instrument

Identify **highest priority** topics

Consider question wording and **flow**

Pilot, finalize, conduct

constructs you want to measure

Consult the **literature** to find existing surveys

Use, adapt or create a new survey

Pilot, finalize, program, deploy

Brief notes on finding existing instruments

Consider search terms for literature search
- Words & phrases about topic
- Derived from your question

Consider access options
- Google Scholar, Research Gate, academic log ins
- Elicit AI
- Proprietary surveys vs. requesting permission

Peruse publicly available surveys
- e.g., PROMIS

Do any **surveys** exist to measure participant **satisfaction** with a **library program**?

ResearchGate

Google Scholar

PROMIS

Other Considerations

Data security

- Paper vs. electronic surveys
- Transcript deidentification
- File naming

Ethical data collection

- Obtaining consent
- Scientific integrity
- Ethical tenets (autonomy, justice, beneficence, non-malfeasance)

TABLE 1. Ethical Tenets of Informed Consent and Scientific Integrity in Surveys

Ethical Tenet	Informed Consent	Scientific Integrity
Autonomy	• Right to participate in a survey or decline • Right to not answer specific questions	• Participant should have decisional capacity to answer survey. • Survey questions should be appropriate for the audience (e.g., not contrary to participants' values, culture, beliefs).
Beneficence	• Understanding there may be no direct self-benefit from participating	• Ensuring instrument has been tested for psychometric properties • Findings should be disseminated, inform future research, and, ultimately, be applied to clinical practice.
Nonmalfeasance	• Information provided for fast access to psychosocial services in the event a survey elicits disturbing feelings for the participant	• Information solicited that may be detrimental to the participant (e.g., knowledge of disease status that could affect insurance coverage) should not be able to be linked to the individual or shared with third parties. • Confidentiality needs to be maintained.
Justice	• Disclosure of populations given access to survey	• Ideally, findings should be applicable to diverse populations. • Efforts should be made to eliminate or mitigate bias.

Hammer, 2017

Surveys: Choosing your platform

Many tools with free or add-on options

SurveyMonkey

Microsoft Forms

Google Forms

qualtrics XM

salesforce

Consider:

- Question limit
- Response limit
- Skip, display logic
- Data monitoring and exporting
- Survey distribution
  - Individual vs anonymous links

What have you found frustrating when taking surveys?

Survey Checklist

For formulating items: ***Does your survey...***

	Yes (1 point)	No (0 points)
Avoid formatting items as statements with agree/disagree response options…		
…And use questions with construct-specific response options instead		
Ask one item at a time (thereby avoiding multibarreled items)		
Use positive language (i.e., avoid *un-*, *in-*, *anti-*, etc.) to ease cognitive processing		
Avoid "reverse-scored" items		
Use item formats that answer your research questions of interest		
Formulating items subscore =	**/ 6**	

For crafting response options: ***Does your survey...***

	Yes (1 point)	No (0 points)
Use an appropriate number of response options		
Include labels for all response options		
Use only verbal labels		
Balance the visual, numeric, and conceptual midpoint of the response options		
Visually separate nonsubstantive choices from the other response options		
Provide response options in only one row or only one column		
Response options subscore =	**/ 6**	

For formatting and organizing the whole survey: ***Does your survey...***

	Yes (1 point)	No (0 points)
Ask the more important items earlier		
Include only items that apply to every respondent (or employ branching items)		
Use scales—not single items—when possible (especially for complex topics)		
Use a consistent visual layout		
Place sensitive items, such as demographic questions, later		
Formatting/organizing subscore =	**/ 5**	

Total score[a] =	**/ 17**

[a]Although there is no absolute target score, a quick tally of the number of "yes" check marks should allow for the comparison of different survey instruments.

Gehlbach & Artino, 2018

Survey Best Practices

Manage the length

Progress indicators keep people engaged

How are you going to use your results?

Compensation

Does not have to be monetary

Explicitly state the value of their responses (especially if it will help them!)

Consider layout and visual appeal

Page breaks, transition between sections, matrix items, keep white space

Communication Best Practices

Pre-message	Survey Intro	Thank You	Reminders
About a week before survey is distributed Sent by leader or familiar person	Confidentiality statement Survey duration Compensation (if any) How responses will be used Contact information	Personalized message is best	Thank those who have responded Response rates can motivate 2-3 is best Communicate timeline

How to ask a good question

1. Questions/Items
2. Response Options
3. Question Order
4. Pilot testing

1. Questions/Items

Avoid leading questions

How much did the career coaching you received through Blue Sky Works improve your confidence?

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1. Questions/Items

Avoid leading questions

How much did the career coaching you received through Blue Sky Works improve your confidence?

What impact, if any, did Blue Sky Work's career coaching have on your confidence?

1. Questions/Items

Avoid leading questions

Ask one question at a time (no double-barreled questions)

Approximately how often does your career coach provide feedback and encouragement?

1. Questions/Items

Avoid leading questions

Ask one question at a time (no double-barreled questions)

Approximately how often does your career coach provide feedback and encouragement?

Approximately how often does your career coach provide feedback on your career goals?

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1. Questions/Items

Avoid leading questions

Ask one question at a time (no double-barreled questions)

Aim for sixth-grade reading level

Be clear about time frames (e.g., past month, last seven days, currently)

2. Response Options

Use context-specific response options

- Consider alternatives to Agree – Disagree

2. Response Options

How much do you agree with the following statement? "I am satisfied with the career coaching I received through Blue Sky Works."

- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly agree

2. Response Options

How much do you agree with the following statement? "I am satisfied with the career coaching I received through Blue Sky Works."

- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly agree

How satisfied are you with the career coaching you received through Blue Sky Works?

- Not at all satisfied
- Somewhat satisfied
- Moderately satisfied
- Very satisfied
- Extremely satisfied

2. Response Options

Use context-specific response options

- Consider alternatives to Agree – Disagree

Number of options matters

- Consider how you are analyzing data
- 5 to 7 options is usually best
- How helpful is having a neutral option?

DARTMOUTH

2. Response Options

- Use context-specific response options
  - Consider alternatives to Agree – Disagree
- Number of options matters
  - Consider how you are analyzing data
  - 5 to 7 options is usually best
  - How helpful is having a neutral option?
- Order of options matters
  - Keep things consistent (e.g., least to most, worst to best)
  - Make it easy for respondents, reduce likelihood of mistakes

2. Response Options

- Use context-specific response options
  - Consider alternatives to Agree – Disagree
- Number of options matters
  - Consider how you are analyzing data
  - 5 to 7 options is usually best
  - How helpful is having a neutral option?
- Order of options matters
  - Keep things consistent (e.g., least to most, worst to best)
  - Make it easy for respondents, reduce likelihood of mistakes
- Use open-ended questions sparingly
  - Tend to have low response rates
  - You may be faced with sensitive data

3. Question Order

First few questions

- Ease respondents into the survey
- Things like their role or position, experience with topic of interest

Important questions: Keep towards the beginning

- Response rates will be highest for earlier questions

Sensitive questions, demographics: Put towards the end

- Reduce stereotype activation

Test Your Survey

- Who are your stakeholders?
  - Patients, community members, students, etc.
  - Not someone involved in survey design
- A few options
  - Allow them to take the survey themselves and provide feedback (pilot testing)
  - Guide them through the survey and ask specific questions (cognitive interviewing)
- Feedback should include
  - Completion time
  - Interpretation and ease of questions
  - Are response options comprehensive?
  - Any missing questions?

Case Example

Sherri Billings, Program Manager

MCD Global Health

MCD Global Health

Brief description of MCD Global Health goals and activities

- Facilitate a clinical ECHO for Maine pediatric providers, their clinical teams, and non-clinical behavioral health professionals that has been ongoing for 3 years (46 sessions!)

Created and used a 5-question survey since the ECHO launched to gather consistent data over time for program feedback and refinements

Recently created a 3-year impact report using the data

Discussion Questions

What changes should (or could) be made to the survey going into the future?

How could interviews with participants and subject matter experts help us tell a powerful impact story?

- Would like to create a video → what is best deployment strategy?

Project ECHO

Additional Questions to Consider

What changes should (or could) be made to the survey going into the future?

"How will this data be used?"

"What can/can't we speak to using the current survey results?"

"What would we gain/lose from editing the survey?"

Understanding Current Survey & Aligning Edits with Goals

What changes should (or could) be made to the survey going into the future?

Current Survey Question	Purpose/Construct it Taps (how the data is used)	Potential Edits
1. How well were the session objectives met?		
2. What part of this session was most helpful to your learning?		
3. As a result of this activity, list one or two things that you plan to change in your practice.		
4. Please rate your agreement with the following statement: The ECHO Learning session has my ability confidence to care for complex pediatric cases.		
5. How likely are you to recommend the ECHO Learning Series to a colleague?		

Additional Questions to Consider

How could interviews with participants and subject matter experts help us tell a powerful impact story?

"How will this data be used?"

"What are the most important questions to ask during interviews?"

"Do we have the time/resources to dedicate to this data collection and analysis?"

Aligning Interview Questions with Goals

How could interviews with participants and subject matter experts help us tell a powerful impact story?

Interview Question	Purpose/Construct it Taps (how the data will be used)
1.	
2.	
3.	
4.	
5.	

Resources

- Gehlbach & Artino (2018) article with survey checklist: https://doi.org/10.1097/ACM.0000000000002083
- Flesch Kincaid Reading Level Calculator: https://serpninja.io/tools/flesch-kincaid-calculator/
- Institute of Education Sciences (IES) template for aligning data collection strategy with logic model components: https://ies.ed.gov/ncee/rel/regions/west/pdf/AligningData_and_Measures_to_Outputs_and_Outcomes_LogicModel.pdf
- Selecting and using keywords: https://www.youtube.com/watch?v=r6kjt2Mt_4w

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Appendix

Consulting the literature

Look for something that is already developed using a **literature search**

Determine which instruments are "**good**"

If nothing exists, consider **adapting** or **creating** an instrument

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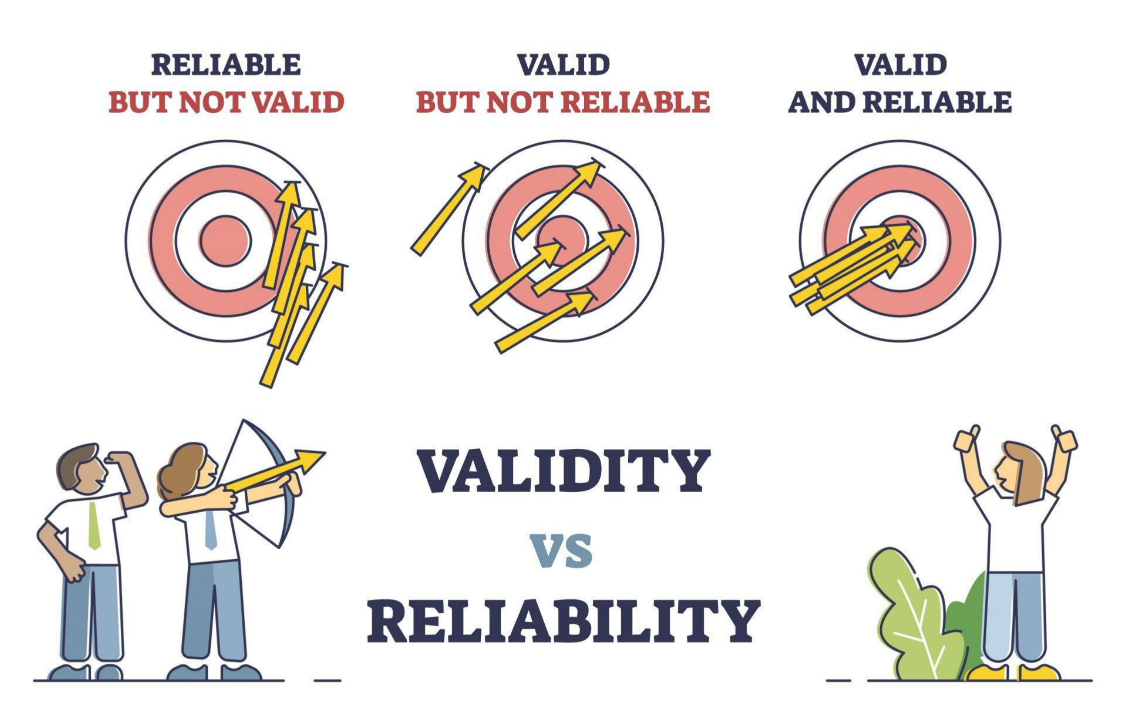

Image from simplypsychology.org

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Consulting the literature

Look for something that is already developed using a **literature search**

Determine which instruments are "**good**"

If nothing exists, consider **adapting** or **creating** an instrument

Does a "good" measure exist?
Does it speak to your evaluation needs?

What doesn't work?
Different audience, add/remove/revise questions

Start over
If nothing works, create new items

Some context-specific items

In the past six months, approximately how often have you…?	Never | Rarely | Sometimes | Often | Very Often
How familiar are you with….?	Not at all familiar | Somewhat familiar | Moderately familiar Very familiar | Extremely familiar
In your opinion, how much value does _____ program have for students?	None | Only a little | Some | A lot | Quite a bit

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Dartmouth Health

Project ECHO®

Session 5:
Making Sense of Data

Laura Bernstein, Ph.D.

Erin Knight-Zhang, Ph.D.

December 4, 2025

Today's Plan

Planning Data Analysis

- Systematic Data Tracking

Data Cleaning, Management, Analysis

Data Visualization

- The role of AI

Creating Reports & Data Summaries

Process of Data Collection, Analysis and Reporting

The Three Steps of Nonprofit Measurement, Evaluation, and Learning

Source: The Bridgespan Group

1. ***Define outcomes and metrics***
   Sessions 1-3
2. ***Measure metrics with data***
   Session 4

Session 5 (today)
Planning data analysis
Preparing data for analysis
Analyzing data
Reporting data

3. ***Learn and improve through data***

Stakeholder Input

The Three Steps of Nonprofit Measurement, Evaluation, and Learning

How?

Stakeholders: individuals who are invested in or affected by the program

Potential Roles:

- Identify primary audience
- Develop report/dissemination plan
- Determine use of evaluation findings
- Verify results
- Develop recommendations

Source: The Bridgespan Group

Planning Data Analysis

Evaluation Question	Purpose	Data	Analysis/ Visualization	Audience
What are participants' perceptions of their experience?	Assess process	(Survey) To what extent were the session objectives met?	Descriptive statistics (% very much) Bar graph	Funder, program staff
		(Survey) How effective was the training format in meeting your needs?	Descriptive statistics (% very much) Bar graph	Funder, program staff
How effective is the program at improving relevant skills and knowledge?	Assess outcomes	(Survey) To what extent did the training change your knowledge of the topic?	Descriptive statistic (% knowledge increase) Dumbbell plot	Funder, program staff

Systematic Tracking

How will you use your data?

- Grant reporting, internal quality improvement, marketing, program impact/development

Track across data sources

- Administrative Data – program enrollment and completion numbers
- Surveys – number distributed, number complete, timing of completion
- Interviews – number of invitations, number of interviews complete

Consider spreadsheets to keep track of progress

- Map your data onto program goals, eval questions
- Note targets and progress
- What time periods make sense? (Monthly, quarterly, yearly)

How much experience do you have…

Using formula functions (e.g., sum, proportions) in Microsoft Excel?

1. None
2. A little
3. A lot

Consolidating your data from multiple sources in Excel (e.g., surveys, administrative data)

1. None
2. A little
3. A lot

Tracking Enrollment: 8 Week Technology Training

= sum()

	Number of Partcipant Drop Outs after each week								Total Drop Outs	
Year	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Total (first 4 weeks)	Total (full 8 weeks)
2023	0	3	1	2	1	0	2	0	6	9
2022	5	0	0	4	3	6	0	0	9	18
2021	4	1	4	0	2	3	1	0	9	15
2020	8	2	3	1	5	0	0	2	14	21

Yearly Enrollment Rates							
Program Arm	Year	Number Enrolled	Number at Halfway	Number Complete	Completion Rate	First Half Drop Out Rate	Second Half Drop Out Rate
Technology training	2023	150	144	141	94.0%	4.0%	6.3%
Technology training	2022	150	141	132	88.0%	6.0%	12.8%
Technology training	2021	150	141	135	90.0%	6.0%	10.6%
Technology training	2020	150	136	129	86.0%	9.3%	15.4%

= E6/C6

Dashboards

- Allow you to monitor your data as it is collected
- Helpful if need to regularly report on program activities at different sites
- A few options:
  - Excel
  - Qualtrics reports
  - Tableau Public (free)
- Tableau Public
  - Steeper learning curve
  - Good if you have the time to learn and need to report regularly
    - Extensive online resources: community forum, YouTube and blog tutorials
  - Anyone can access and view your data visualizations

Data cleaning

Survey platform or collection system may already create graphs or charts, BUT

- Some basic data cleaning should be considered
  - Do all respondents meet your criteria for inclusion? (job role, geographic location, etc.)
  - How complete should responses be?
  - If available, check length of time to complete
  - Scale scoring and data checking

Data Management Best Practices

Keep a sheet of raw, unedited data

Store identifying information separately – use participant IDs

Data dictionary/codebook – what is available from your data collection platform?

Decision tracking

Annotate your work

Data Analysis

	Descriptive Statistics	Inferential Statistics
What does it do?	Summarizes and **describes** *your* data	Test hypotheses, make **inferences** about larger population

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Data Analysis

	Descriptive Statistics	Inferential Statistics
What does it do?	Summarizes and **describes** *your* data	Test hypotheses, make **inferences** about larger population
Examples	Mean, Range, Frequencies, Percentages, Standard Deviation	Correlations, p-values, t-tests, regressions

Data Analysis

	Descriptive Statistics	Inferential Statistics
What does it do?	Summarizes and **describes** *your* data	Test hypotheses, make **inferences** about larger population
Examples	Mean, Range, Frequencies, Percentages, Standard Deviation	Correlations, p-values, t-tests, regressions
Pros	Good for small sample sizes Data does not need to meet certain assumptions	You can draw more conclusions and generalize beyond your data
Limitations	You are limited in generalizing beyond those in your sample	Requires at least ~30 responses Data must meet certain assumptions

Descriptive Statistics

What you **can** say:	What you **can't** say:
How do assessment scores change from before the program to after?	What effect does this program have on assessment scores?

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Descriptive Statistics

What you **can** say:	What you **can't** say:
How do assessment scores change from before the program to after?	What effect does this program have on assessment scores?
How does group A compare to group B on post-program assessment scores?	Is being in group A correlated with higher post-program scores?

General language to avoid:

- Significant
- Cause/causation
- Effect
- Correlate/correlation

Data Visualization

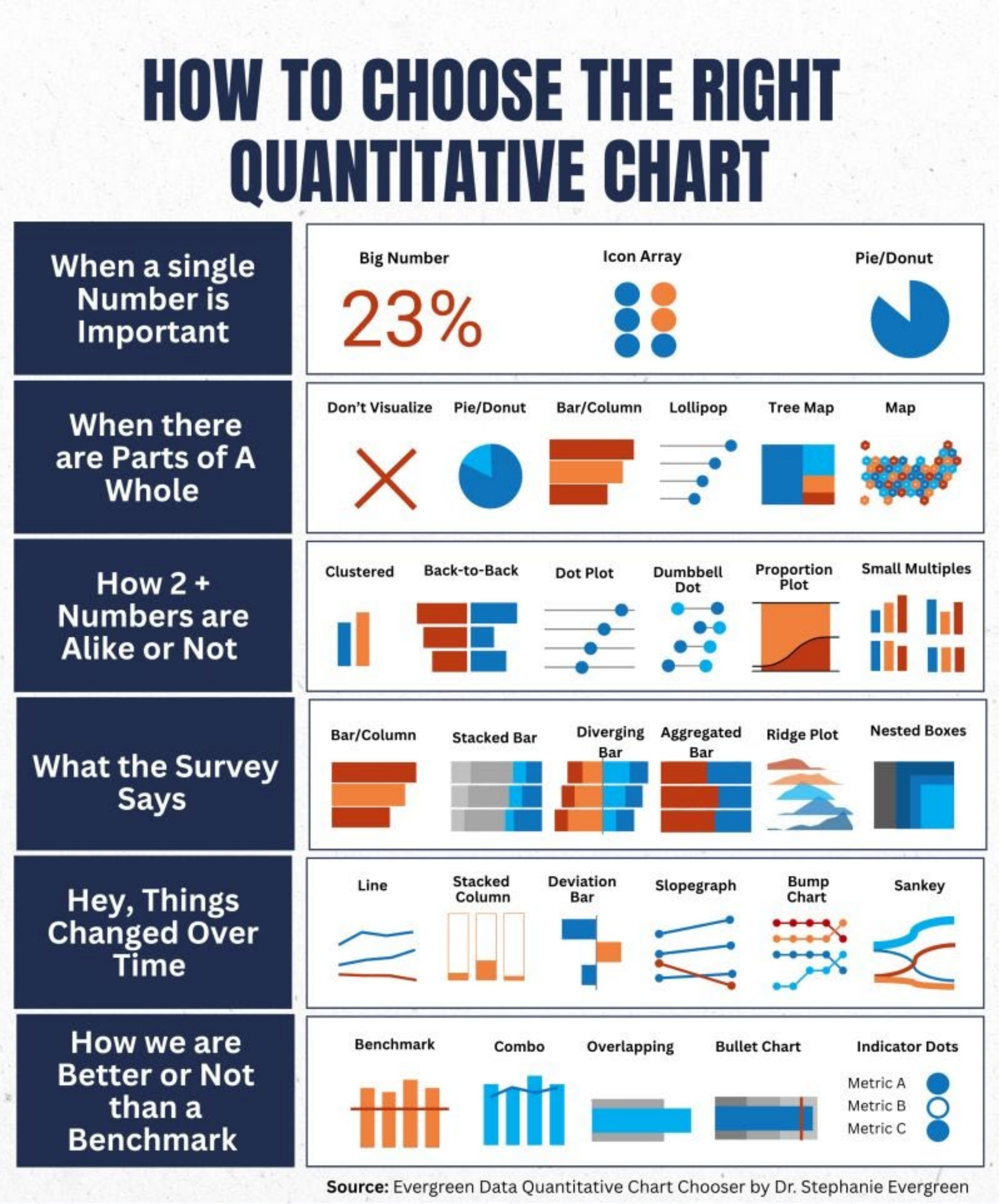
First, consider whether a graph or figure is necessary

- Single numbers or percentages may stand alone

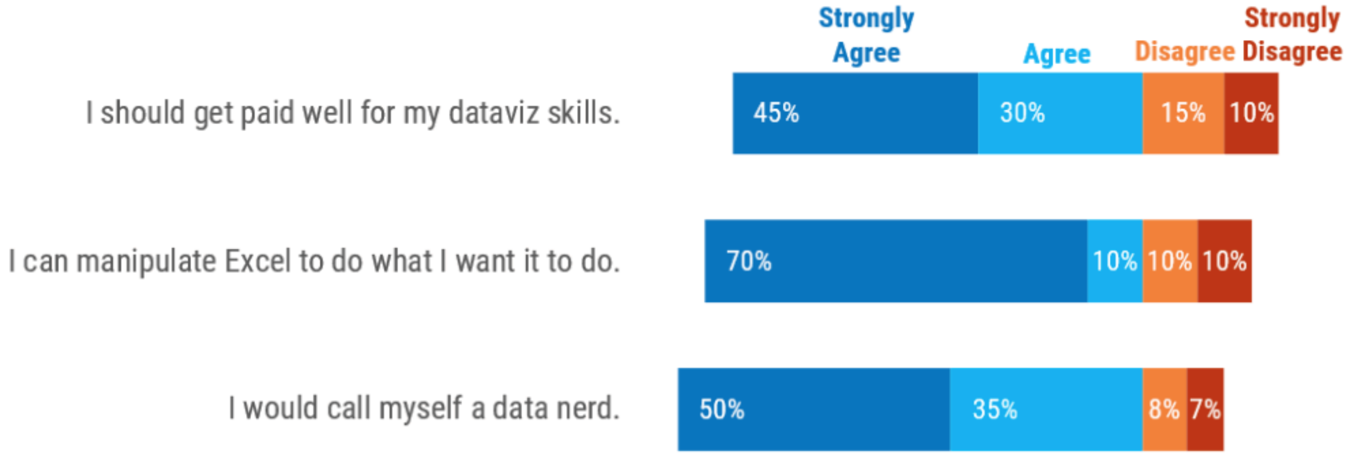
Next, think about what are you trying to communicate

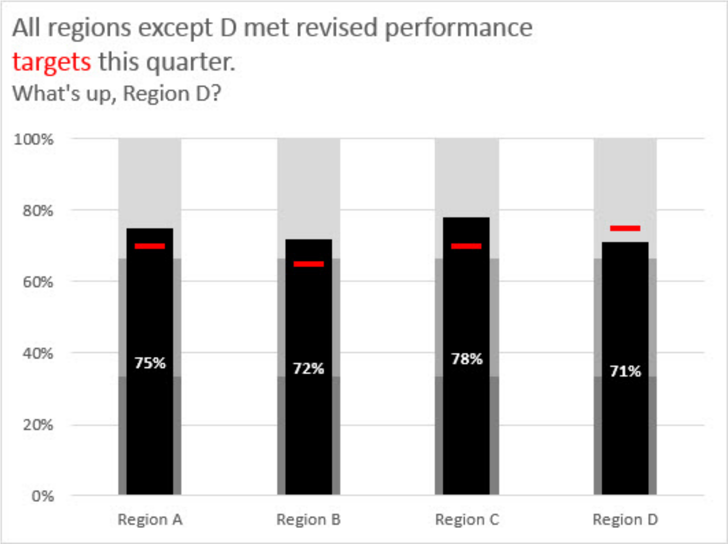
- Composition – parts of a whole
- Trend over time
- Comparison – between groups, response options
- Relationship – between variables

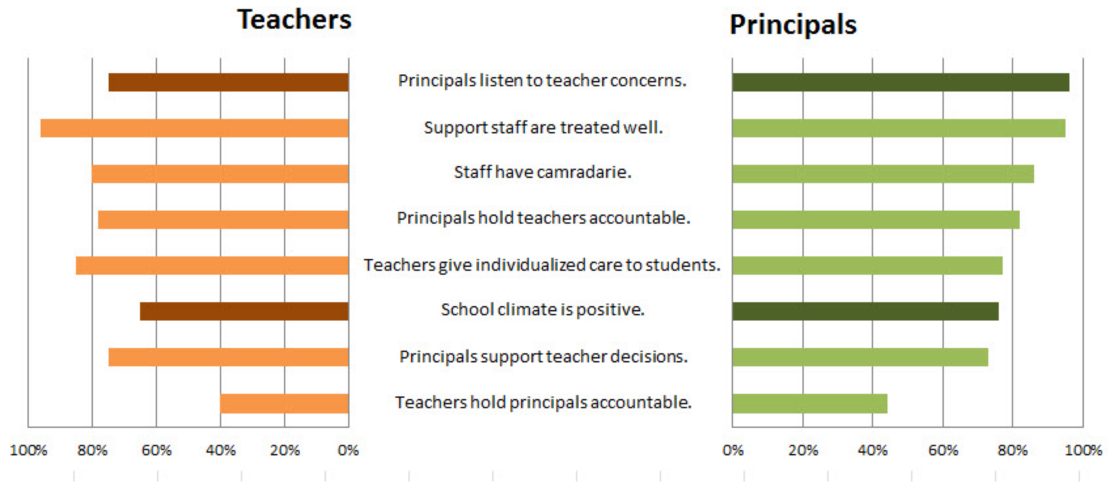
Chart Chooser



Excel can be a powerful tool







Using AI Responsibly

Do not share raw or identifiable data on an AI platform

Specificity is key

- Tool you are using, what you want to do, what exactly you are looking for (code, instructions, efficiency)

Don't assume it is right

- Analysis may have errors
- Currently, no strong options to create data visualizations for you

Use it as a tool for learning

- How can you work toward independent data analysis?
- Idea generation

Tips for Creating Reports & Summaries

- Think about your **audience**
- Identify your **main messages**
- Consider **approach** and **organization**
- **Connect** data & viz back to points
- Make it **digestible & actionable**

Institute of Education Sciences

Determining the Audience

Directions: Use the table below to begin determining your audience for dissemination.

- **Audience groups**: What are the large groups of people who need to hear about your findings? (For example, parents, staff, funders, staff from outside organizations, community members, state education agency officials.)
- **Specific individuals or organizations**: Are there specific individuals or subgroups within the larger groups who you want to target? Are there organizations such as intermediaries that may be able to help you access the audience?
- **Purpose**: Why does the audience need to hear about your findings? What do you hope to gain by sharing the findings with them?
- **Use of findings**: How will the audience groups you identify use the findings? What will they learn from the findings?

Audience Group	Specific Individual or Organization	Purpose	Use of Findings
Example: *Parents*	*Jill Ramos (Parent-teacher organization president)*	*Support for the initiative*	*To understand how the program improved outcomes for their children*
Example: *Funder*	*Lin Yu (Program officer)*	*Continued funding*	*To understand if the program achieved its goals and if it should continue to be funded*

Institute of Education Sciences

Summary Template

What are the three most important findings from your evaluation?
Example: *Ninety percent of math tutors who received training from AMMP! indicated that they felt ready to use the effective techniques.*
1.
2.
3.

Explain the topic in plain language. (How would you explain it in basic terms to your next-door neighbor?)
Example: *The middle school implemented AMMP! after the district received a grant to improve middle school math instruction. AMMP! is an after-school program that provides tutoring, math extension activities, field trips, and other social activities. Training for tutors is critical to making sure that students receive high-quality math tutoring.*

Which of the following will be affected by the findings?
Example: *With 90 percent of the tutors ready to provide tutoring services for AMMP!, we anticipate changes in student outcomes.*

- Instructional practice
- Student outcomes
- Policy
- Other ____________________

Where can the reader find more information?
Example: *You can find our full report and a link to details about AMMP! on the district website.*

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Report Title

Executive Summary

Here is a 1- or 2-page summary of the primary points of the report.

Background and Purpose

Here is a summary of context that is important for the report.

Statement of the purpose of the report.

Methods

How did you get the data? Who were the participants? What procedures did you follow?

Results

Here is a breakdown of findings, organized in a way you determine to be most effective (e.g., by evaluation question).

How effective was the program at improving skills?

Narrative and data displays.

How effective was the program at placing participants?

Narrative and data displays.

Recommendations and Lessons Learned

Interpretation of findings and recommendations rooted in the data.

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Tips for Creating Reports & Summaries

Think about your **audience**

Identify y… main messag…

&

Who **needs** to hear about your

How can you **communicate w**

What is their technical expertis

What is **culturally appropriate**

What are their **perceptions** an

How might **their preferences** i

How might the results be **filter**

IES Institute of Education Sciences

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Tips for Creating Reports & Summaries

Think about your **audience**

Identify your **main messages**

Cons… appr… orga…

What is your program's **change story**? What s…

What do you want people to **take away** from th…

What **actions** do the data suggest they should…

How might your **findings be useful** to your inte…

What **questions** would your audience have ab…

What are **your biases** that might influence how…

IES Institute of Education Sciences

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Evaluation brief

Evaluation report

In-person meeting with slides

Data dashboard

Other options (e.g., infographics, videos)

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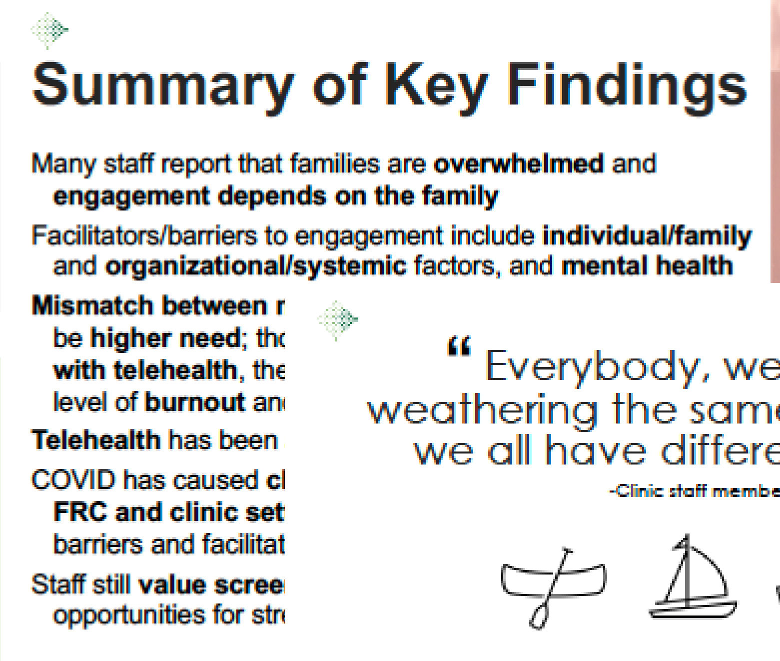

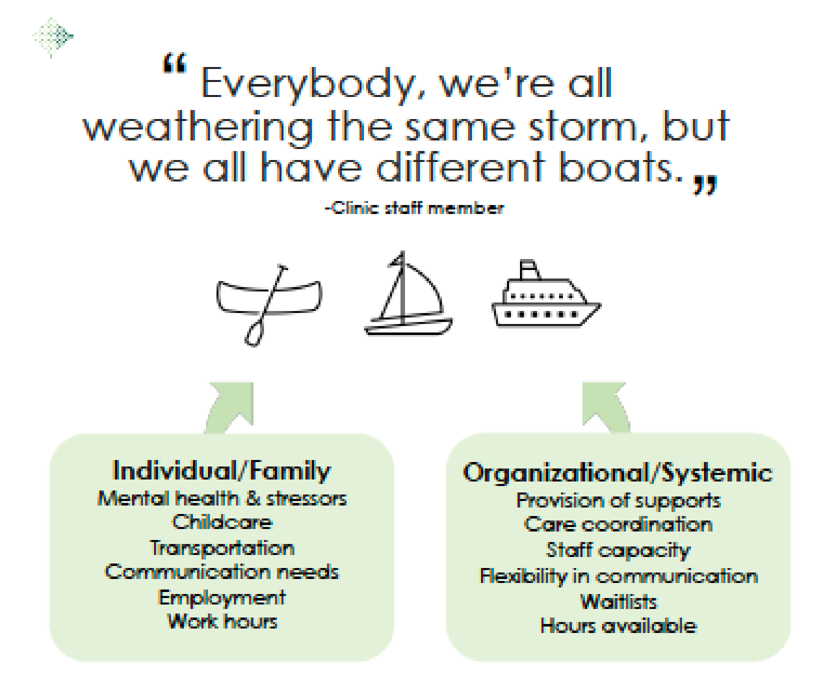

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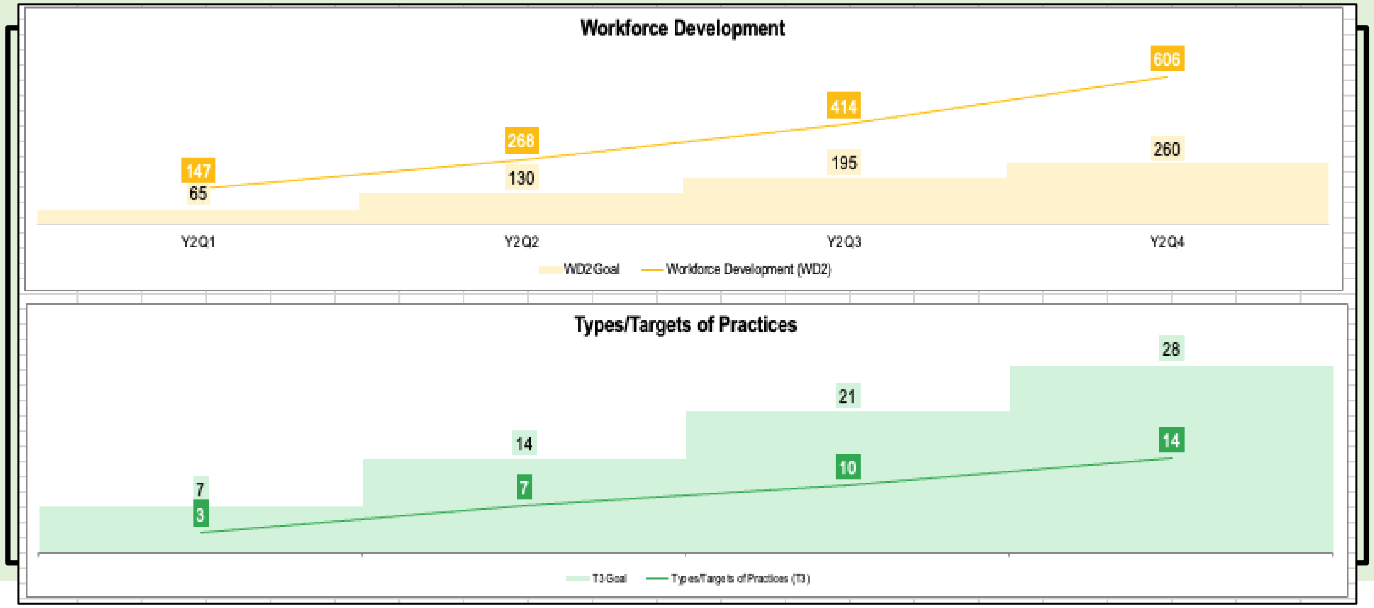
Excel, Tableau Public, Qualtrics



What are the needs of your audience in receiving the report?

What are your needs?

What do you have time and budget for?

What are the needs of the message to get it across?

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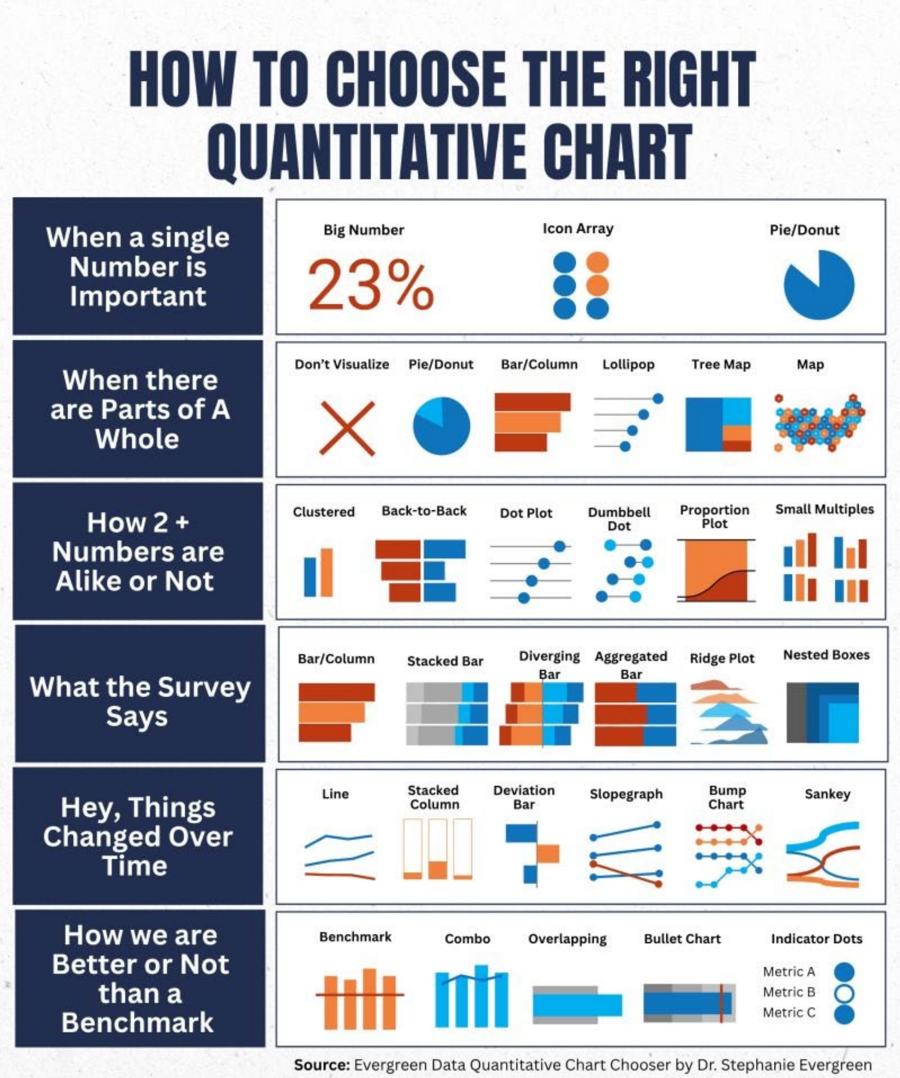

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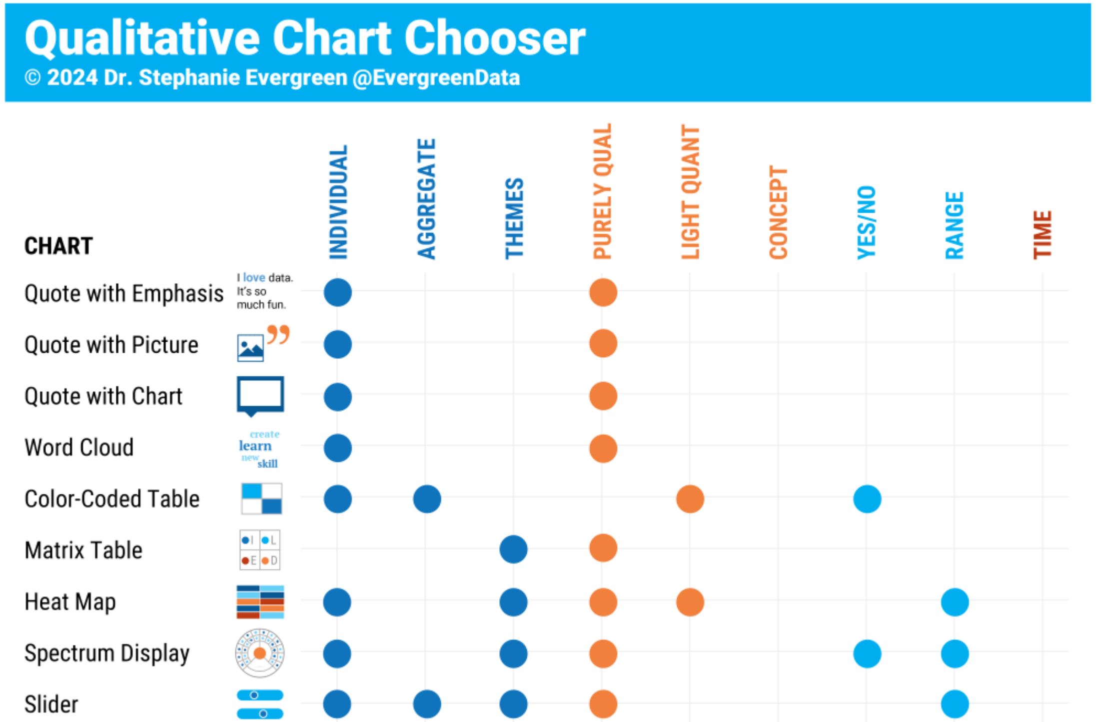

Tips for Creating Reports & Summaries

Think about your **audience**

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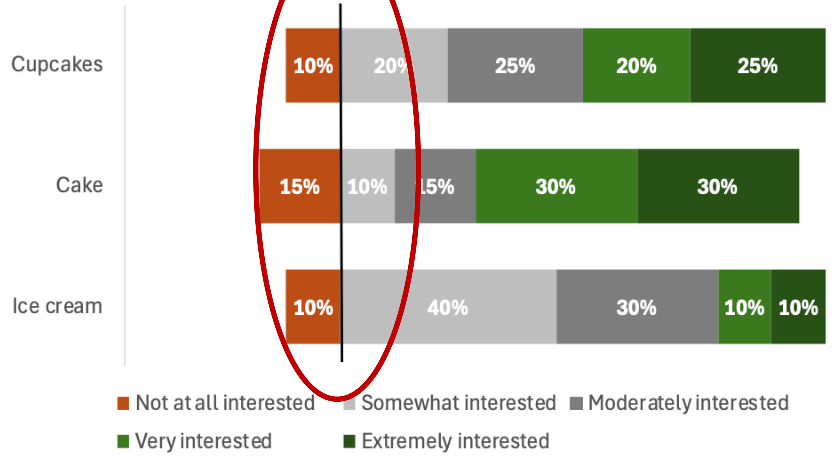
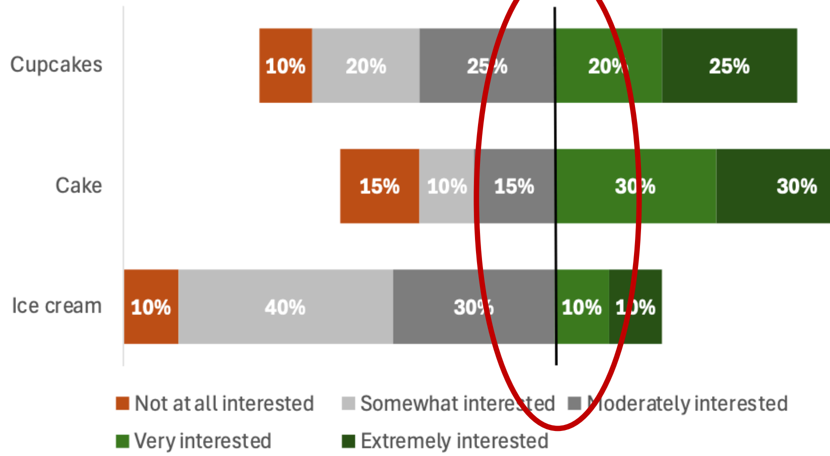
Make it **digestible** & **actionable**

Question: what topics do people want us to cover in a training on dessert?

People are really interested in **all the topics** we plan to cover!



While most people are at least somewhat interested in all topics, **over half** of people are **very or extremely interested in cake**.



Tips for Creating Reports & Summaries

Think about your audience

Identify your

Consider

Connect data

Make it **digestible & actionable**

How long sh

Prioritiz

Longer

Some p

not app

Use plain lar

Break it up v

Provide real

se/data

particularly *if you do*

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Actionable Steps: [Project] Team

Findings	Implications/ Ideas Suggested by Interviewees
Engagement generally seems to depend on the family	Administer survey to larger staff audience to explore further
Cross-system coordination is a facilitator to family engagement by parents/staff	There is interest in continuing to build and facilitate cross-system coordination FRC staff helping with screeners
Connections to resources helped parents and can be accomplished remotely by staff	Provide information/formalize processes to connect families to resources "Doing outreach…in a coordinated way" Opportunities with [Project] newsletter
Screening practices have generally stayed the same or increased in recent months for parents who do engage	Disseminate findings on reducing barriers & increase facilitators to interested FRCs/clinics E.g., using different forms of communication

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Case Study

Blue Sky Works

Aim: increase career stability of low-income young adults by providing them with **hands-on skill development in technology, career coaching, and job placement**.

Current data

Enrollment numbers since 2018

Post–program participant surveys

Reporting needs & audiences

Marketing to expand programs

Obtain more grant and foundation funding

Group Discussion

Any other data we could potentially collect / analyze to show program impact?

What types of reports or briefs would be best given the needs (marketing to expand programs; obtaining additional grant / foundation funding)?

Which program stakeholders would be important to engage in report creation?

Enrollment Data

Total Participants: 1400

AGE DISTRIBUTION

mean	21.48 (+/-2.3 years)
range	18-25

GENDER DISTRIBUTION:

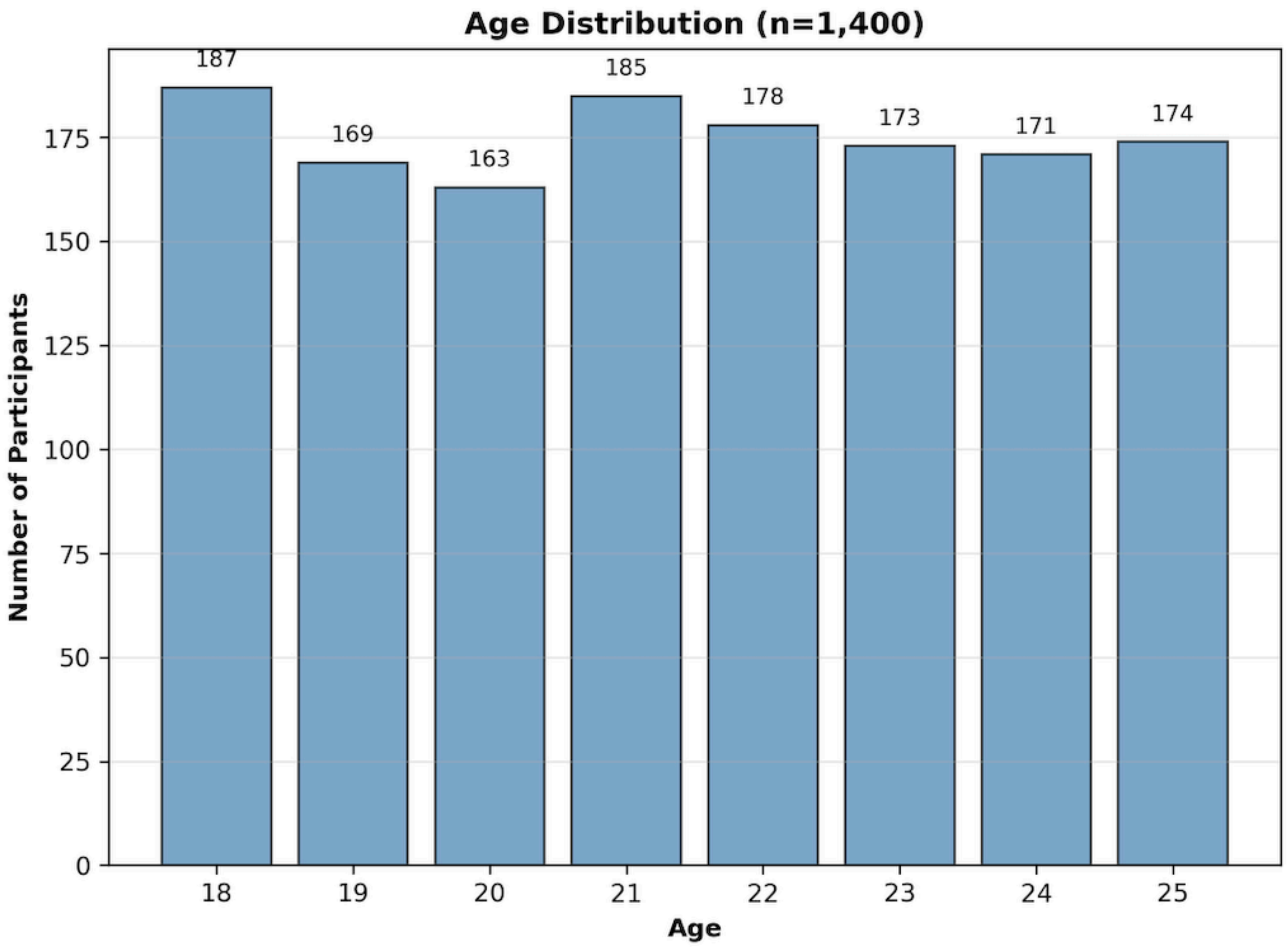
Female	684
Male	657
Non-binary	59

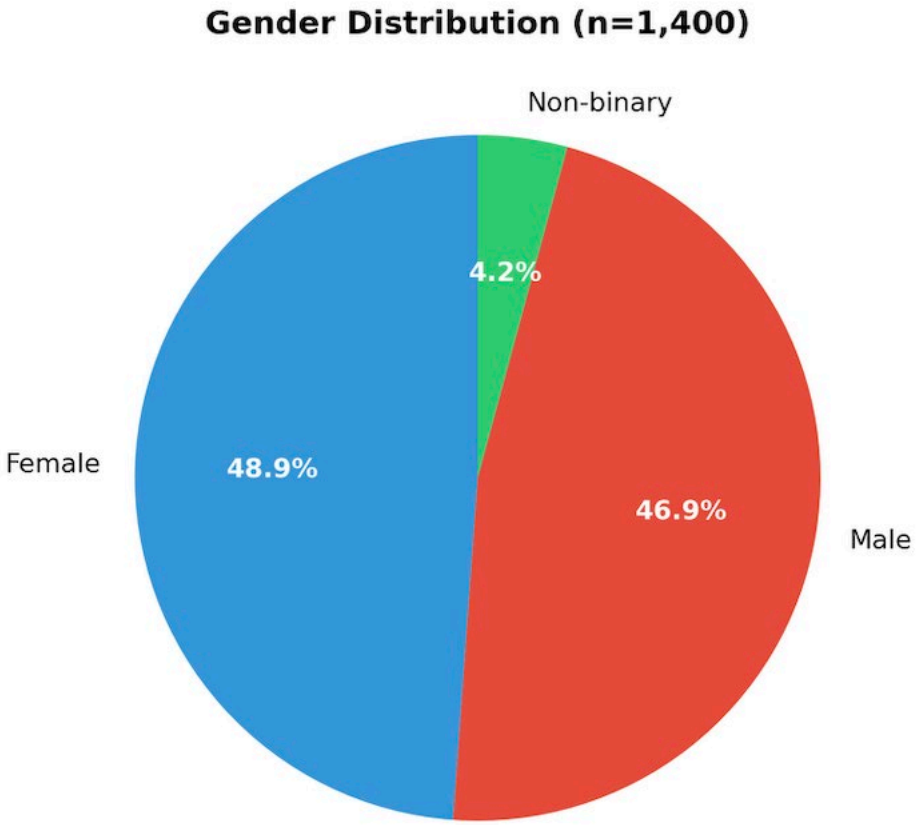
HOUSEHOLD INCOME DISTRIBUTION:

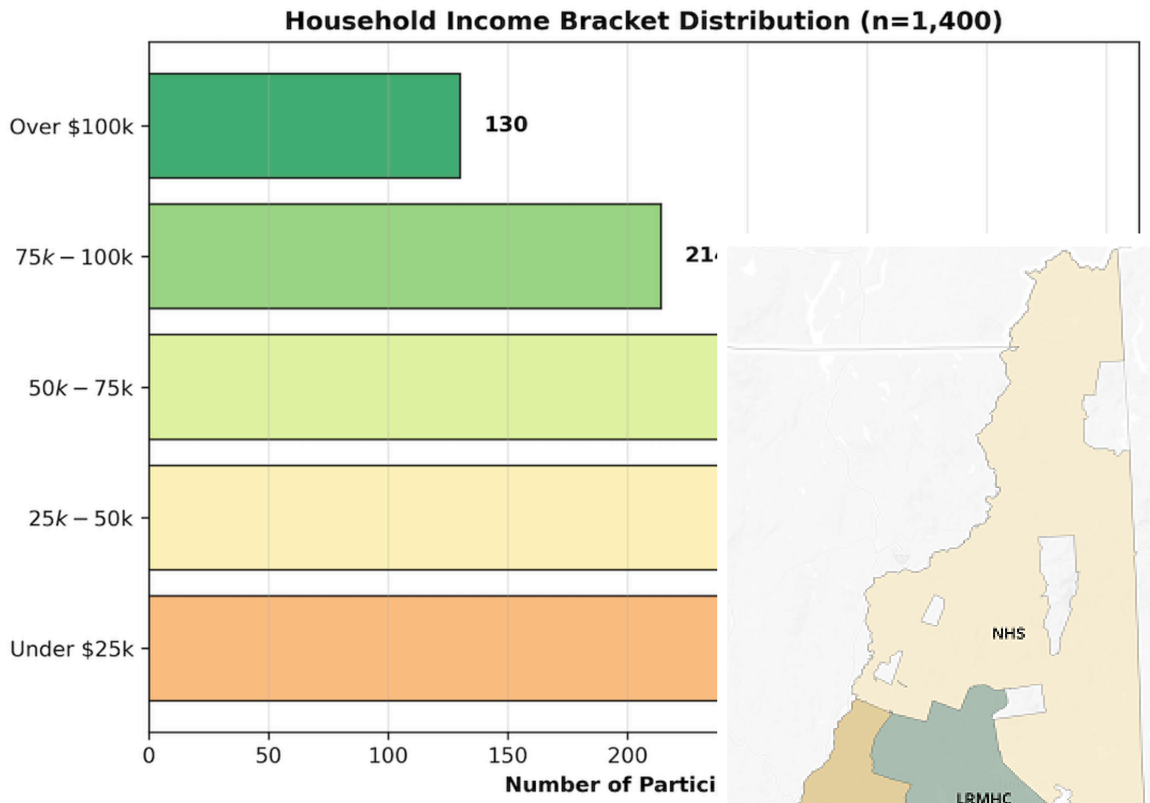
Under $25k	339
$25k-$50k	394
$50k-$75k	323
$75k-$100k	214
Over $100k	130

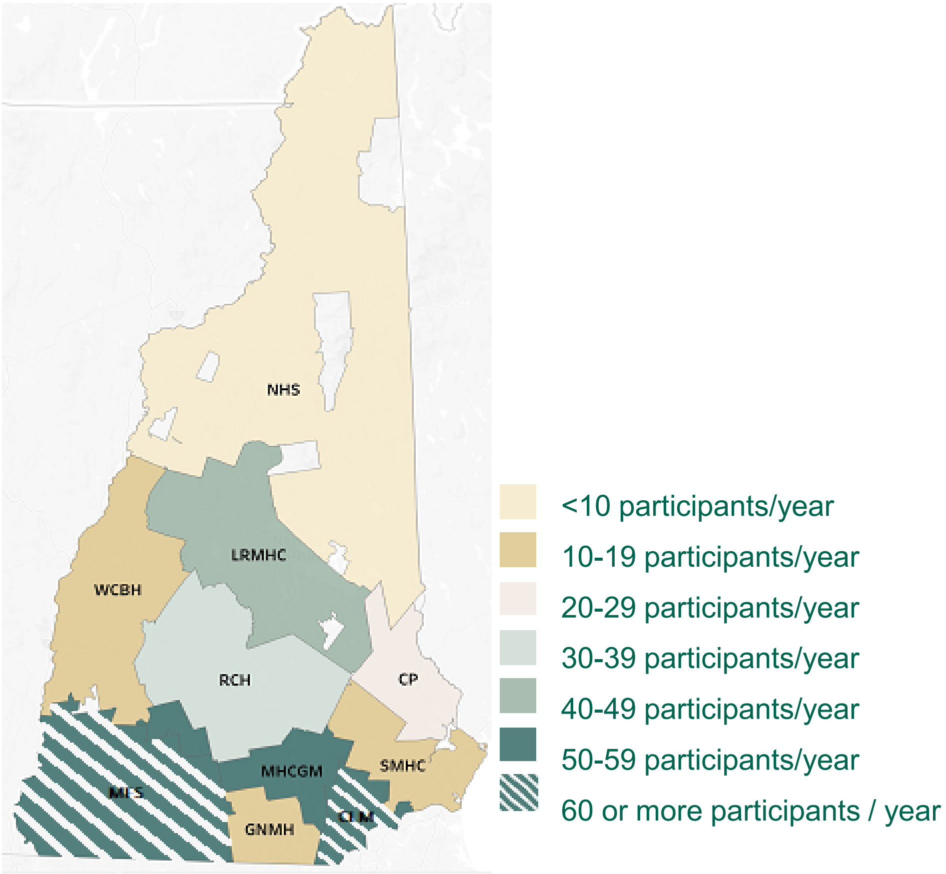
RACE/ETHNICITY DISTRIBUTION:

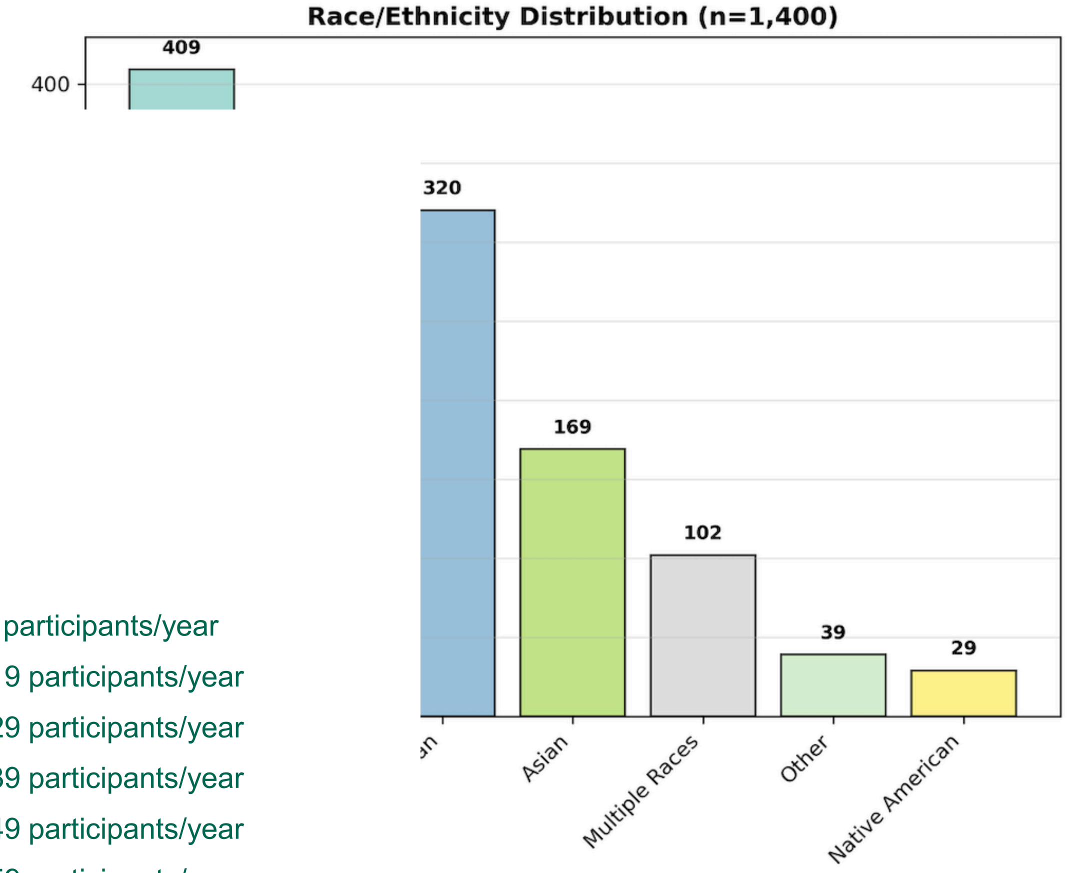
White	409
Hispanic/Latino	332
Black/African American	320
Asian	169
Multiple Races	102
Other	39
Native American	29

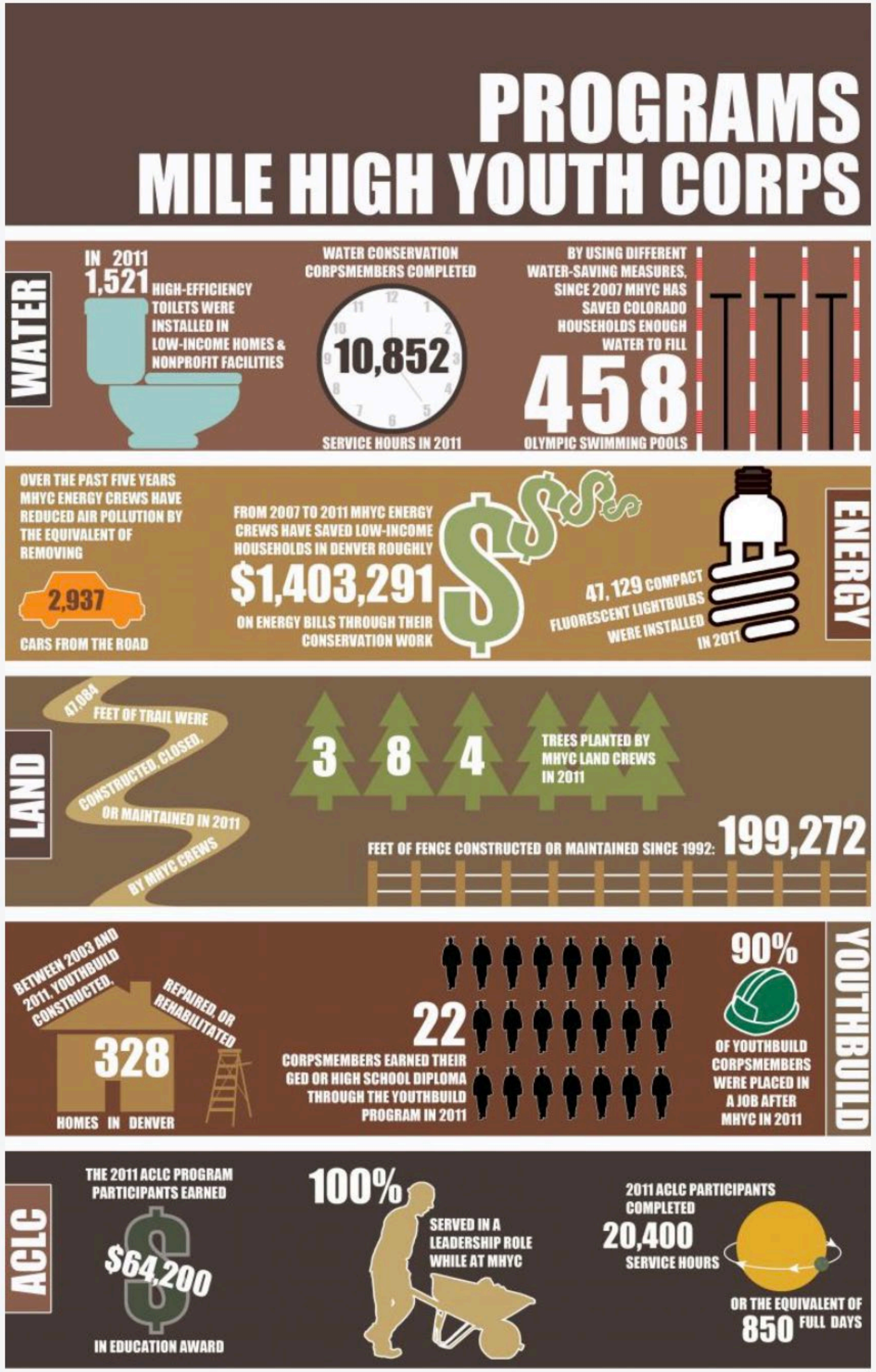

Age Distribution (n=1,400)
Number of Participants
Age
18
19
20
21
22
23
24
25
187
169
163
185
178
173
171
174
0
25
50
75
100
125
150
175

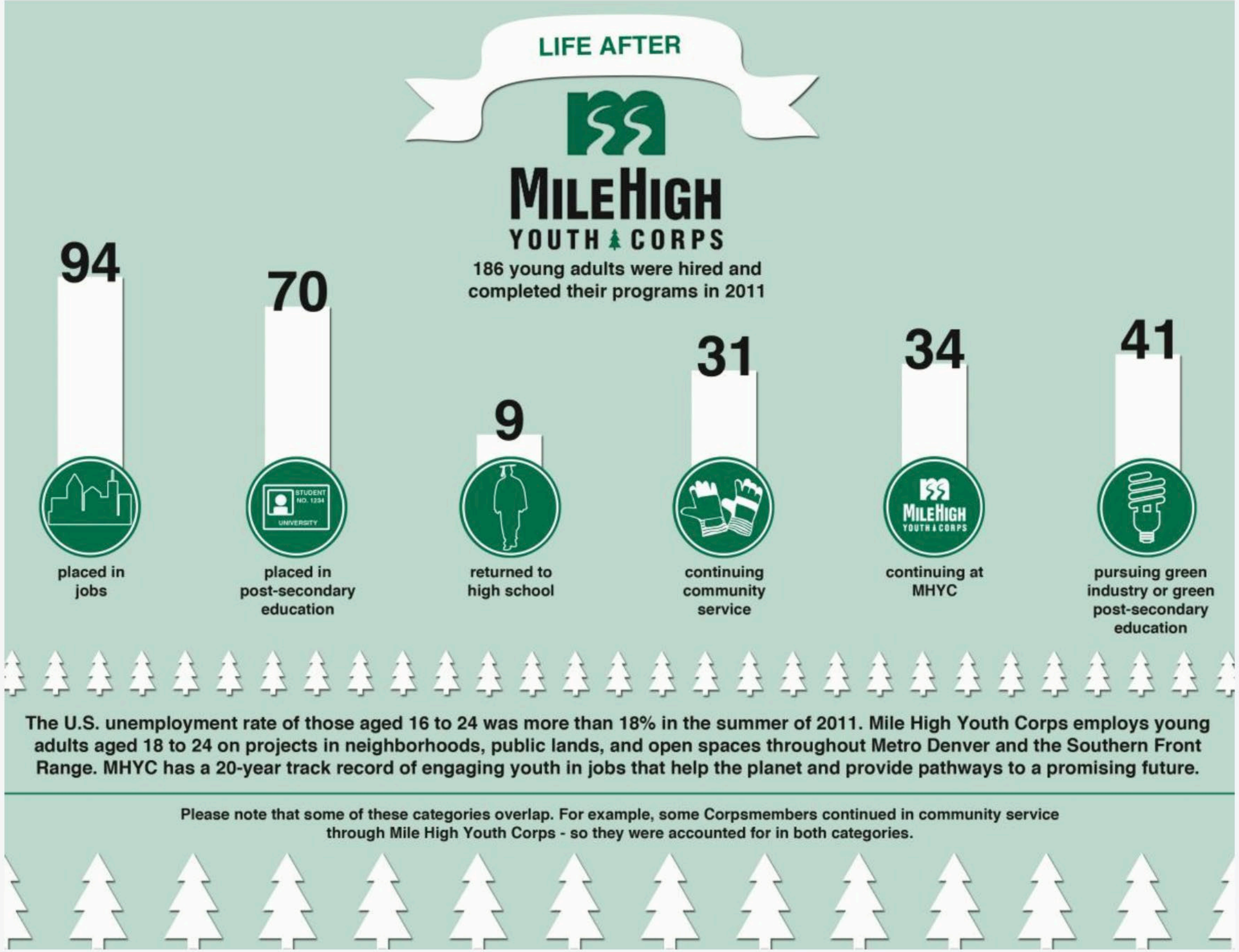

Gender Distribution (n=1,400)
Non-binary
4.2%
Female
48.9%
46.9%
Male


Household Income Bracket Distribution (n=1,400)
Over $100k
75k – 100k
50k – 75k
25k – 50k
Under $25k
130
21
0
50
100
150
200
Number of Partici


NHS
LRMHC
WCBH
RCH
CP
MHCGM
SMHC
GNMH
<10 participants/year
10-19 participants/year
20-29 participants/year
30-39 participants/year
40-49 participants/year
50-59 participants/year
60 or more participants / year


Race/Ethnicity Distribution (n=1,400)
400
409
320
169
102
39
29
Asian
Multiple Races
Other
Native American

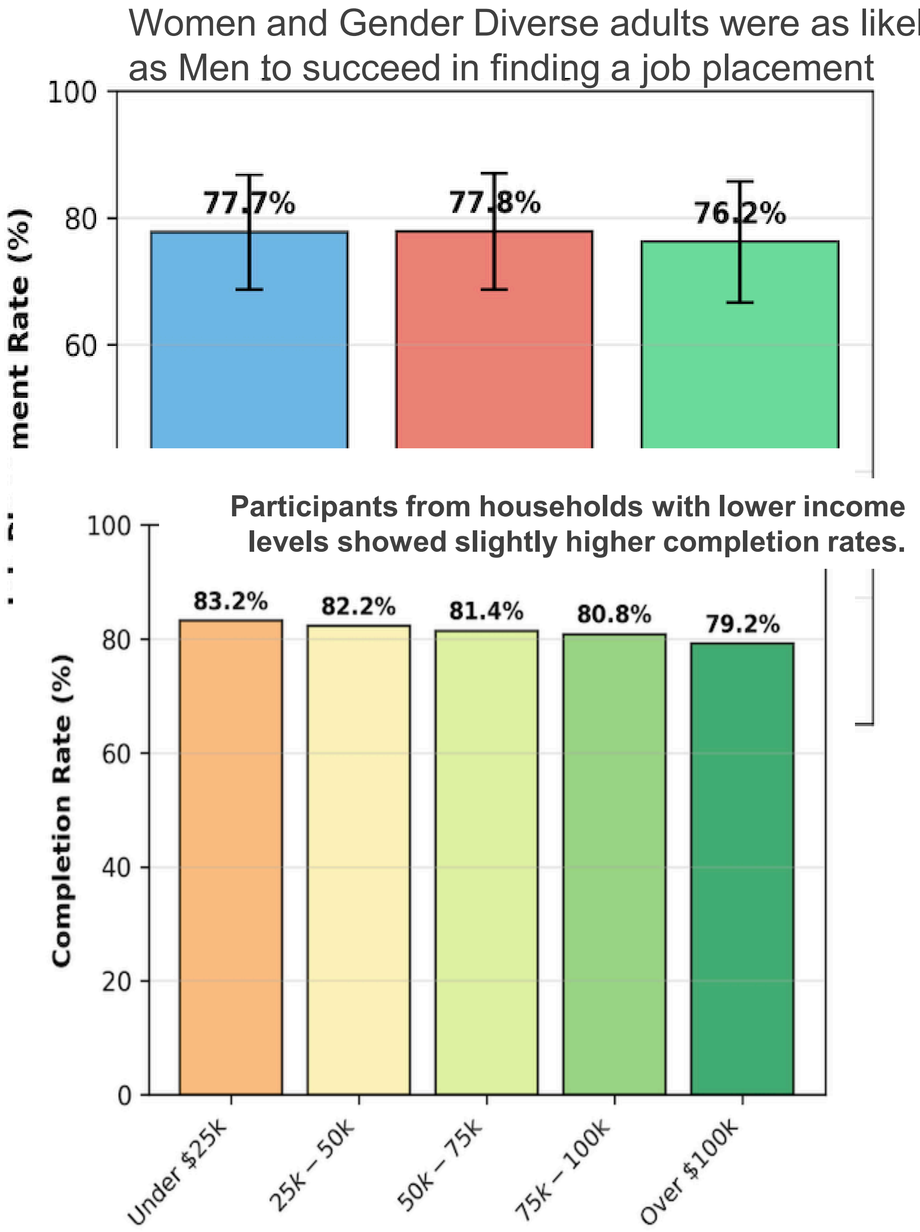




Kate Prestine, Americorps VISTA

Outcomes Data for a Grant Application

- Job placement rates
  - Region of the state (or out of state)
  - Type of job setting
- Starting Salary
- Program Completion rates
- Satisfaction ratings; Interview narratives
- If enough data, could compare outcomes by subgroup



Resources

How to build Excel dashboard: https://support.microsoft.com/en-us/office/create-and-share-a-dashboard-with-excel-and-microsoft-groups-ad92a34d-38d0-4fdd-b8b1-58379aae746e

Report layout checklist (Stephanie Evergreen): https://stephanieevergreen.com/wp-content/uploads/2011/05/ERLC.pdf

Writing executive summaries: https://stephanieevergreen.com/evaluation-executive-summaries-reports/

IES Program Evaluation Toolkit: https://ies.ed.gov/use-work/resource-library/resource/tooltoolkit/program-evaluation-toolkit

- Determining the audience
- Example summary template
- Report checklist
- Dissemination approaches

CDC guide: https://www.cdc.gov/training-development/media/pdfs/2024/04/Evaluation-Reporting-Guide.pdf

Chart choosers: https://stephanieevergreen.com/wp-content/uploads/2024/01/Qualitative-Chart-Chooser-2024.pdf

https://infoguides.gmu.edu/data-visualization/types

Data Visualization Checklist: https://stephanieevergreen.com/updated-data-visualization-checklist/

Data Visualization Tutorials: https://stephanieevergreen.com/how-to/

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Up Next

- Next session: December 18th, From Theory to Practice: Building your Evaluation Tools and Strategy
- Please submit your cases/questions and view course resources at the: DH iECHO site
- Recordings will be posted on the D-H ECHO website https://www.dartmouth-hitchcock.org/project-echo/enduring-echo-materials

WELCOME to

Stronger by Design: An ECHO for Practical Strategies to Evaluate and Amplify Impact

Session 6, From Theory to Practice: Building your Evaluation Tools and Strategy- *December 18, 2025*

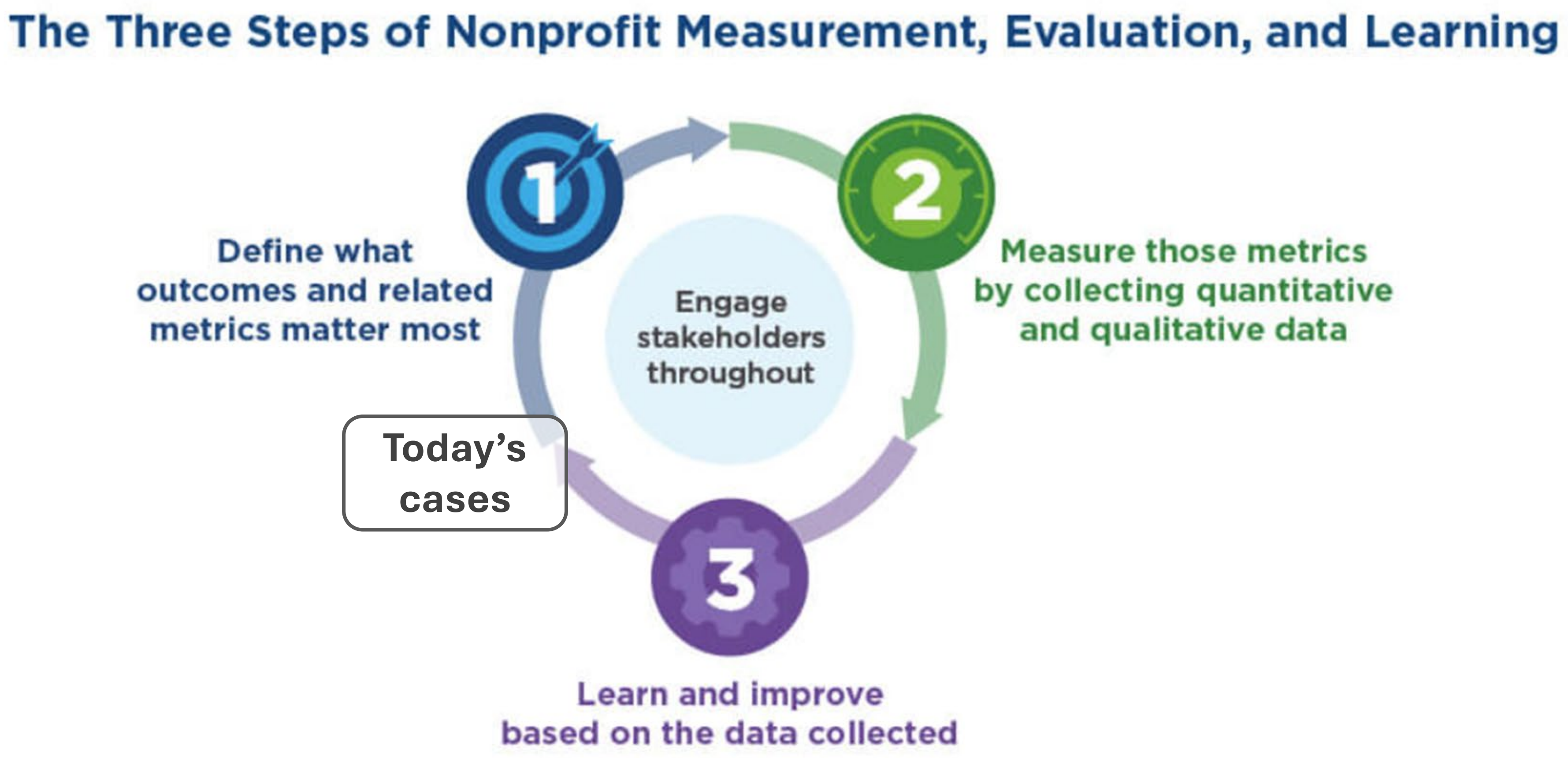
Series Sessions

Date	Session Title
10/9/2025	The Power of Evaluation for Strengthening Communities
10/23/2025	Creating a Roadmap to Measure Success
11/6/2025	From Theory to Practice: Hands-on Evaluation Planning Workshop
11/20/2025	Gathering Data and Information about your Program
12/4/2025	Making Sense of Program Data to Help Others See your Value
12/18/2025	**From Theory to Practice: Building your Evaluation Tools and Strategy**

Today's Program

- Brief housekeeping
- Two Case Examples
    - Case #1: Community Needs Assessment Outcome Tracking
    - Case #2: Designing & Creating a Chronic Care Dashboard
- Discussion
- Summary
- Post course survey

Putting All the Pieces Together



Case #1

Community Health Needs Assessment (CHNA) Outcome Measurement

Magdalynn Graul, MPH

The Center for Population Health, Cheshire Medical Center

Background & Intro

Jan 2024 – July 2025 CMC & partners conducted a Community Health Needs Assessment of Cheshire's region

Aims:

- Better understand the health-related issues and concerns impacting the well-being of area residents;
- Inform community health improvement plans, partnerships, and initiatives; and
- Guide community benefit activities of Cheshire Medical Center and partner organizations.

CHNA Methods & Data Sources

Monadnock Community Health Survey 2024

Leaders N=85 (45% response rate); Residents N=501 (represent 27 of 33 towns)

Community Focus Groups

Community Data 2025 (housing, income, race, age, employment, etc.)

NH Department of Health and Human Services Population Data

Cheshire Social Drivers of Health Primary Care Patient Screener

Developed 4 CHNA-informed Main Goals

Strategy 1: *Address* the Needs of our **Aging Population**

Strategy 2: *Improve* Systems to Support **Behavioral Health** in our Community Across the Spectrum

Strategy 3: *Maintain* **Access to Healthcare Services** in our Rural Region

Strategy 4: *Support* Community Infrastructure that Seeks to Address the **Social Drivers of Health**

Strategy 1 (Aging supports): Key CHNA Results

- 1 in 3 older adults have significant mobility restrictions
- 1 in 3 older adults have had a fall in past 12 months
- 65% of respondents report challenges accessing 1 or more Health services
- Aging in place services often not available & costs are high
- Long term care options hard to find, including getting assistance with LTC planning

Strategy 1 (Aging supports): Key CHNA Results

Five main qualitative themes emerged from focus groups

1. Health Care Access
2. Health Care Insurance
3. Specialty Care Needs, including mental health, substance use, LGBTQIA+, and senior care
4. Community Cohesion, including social isolation and civic engagement
5. Socioeconomic Barriers

| TABLE 6. Top Reasons Respondents Had Difficulty Accessing Health Care Services by Type of Service |

(Percentages are of those respondents who reported difficulty accessing the particular type of service)

MENTAL HEALTH CARE (n=153, 34% of respondents)	PRIMARY HEALTH CARE (n=117, 26% of respondents)	SPECIALTY MEDICAL CARE (n=109, 24% of respondents)	DENTAL CARE FOR ADULTS (n=107, 24% of respondents)
63% of respondents who indicated difficulty accessing Mental Health Care also selected **"Service not available"** as a reason	**56%** of respondents who indicated difficulty accessing Primary Health Care also selected **"Not accepting new patients"** as a reason	**77%** of respondents who indicated difficulty accessing Specialty Medical Care also selected **"Wait time too long"** as a reason	**56%** of respondents who indicated difficulty accessing Dental Care for Adults also selected **"Cost too much"** as a reason
Wait time too long (61%)	**Wait time too long (31%)**	**Not accepting new patients (43%)**	**No insurance or not enough insurance (56%)**
Not accepting new patients (51%)	**Service not available (30%)**	**Service not available (43%)**	**Not accepting new patients (36%)**
Cost too much (28%)	**Cost too much (23%)**	**Cost too much (29%)**	**Wait time too long (29%)**
No insurance or not enough insurance (27%)	**No insurance or not enough insurance (20%)**	**No insurance or not enough insurance (18%)**	**Service not available (27%)**
Did not know where to go (22%)	**Not open when I could go (16%)**	**Had no way to get there (8%)**	**Did not know where to go (10%)**

Other survey options included: No internet access, Language barriers, My race or ethnicity not welcome, My gender or sexual orientation not welcome, My culture or religion not welcome, Other reasons (write-in).

| TABLE 8. Top services or resources people would use if more available, by Age Group |

Age 18-44 (n=112)		Age 45-64 (n=158)		Age 65+ (n=143)		Households with children (n=122)	
Recreation and fitness programs	52%	Recreation and fitness programs	41%	**Recreation and fitness programs**	34%	Recreation and fitness programs	49%
Mental health services	51%	Mental health services	37%	**Balance classes and programs to prevent falls**	32%	Mental health services	48%
Affordable, dependable child care	48%	Bike and walking paths	35%	**Public transportation**	25%	Before- and after-school activities	45%
Before- and after-school activities	46%	Nutrition and cooking programs	34%	**Bike and walking paths**	23%	Nutrition and cooking programs	40%
Nutrition and cooking programs	42%	Public transportation	32%	**Programs that address body weight**	22%	Affordable, dependable child care	38%
Summer lunch programs for youth	37%	Programs that address body weight	29%	**Mental health services**	20%	Summer lunch programs for youth	38%
Bike and walking paths	34%	Caregiver support; respite care	22%	**Nutrition and cooking programs**	20%	Bike and walking paths	32%

Strategy 1: Draft Outcomes

Implementation Activities	Draft Outcomes	Additional Ideas from group?
Take steps towards becoming a **designated Age Friendly Healthcare System** and **Age Friendly Public Health System** through Trust for America's Health frameworks	Number of *Trust for America's Health* accreditation rubric action items completed to become designated Age Friendly	
Partner with local community providers (Home Healthcare and Hospice services, Keene Senior Center, etc) to support initiatives and services for our aging population for things like falls prevention, medical center transportation, Senior Meal Deals, …	Measure project milestones, Community Benefit dollars contributed	
Develop and deploy community health education programs that meet the needs of older adults (Chair Yoga, Silver Sneakers, Advanced Directive planning)	Number of programs offered, number of participants, number of high impact communities served	

How to identify highest value target Outcomes

What could you do with the tools & tips from this series?

How to identify highest value target Outcomes

Current Situation

Program/Org Goal

What problem we are trying to solve?

Inputs

What we invest by whom (staff, partners)

Activities

What we do and to whom/where

m

Walk out the linkages between activities and outcome

Check assumptions that activities will logically addr

Which problems can we 'solve' given our locus of cont

What is the evaluation timeline?

What is feasible with resources & time?

Ensuring the Link between Data Collection, Key Questions & TOC

	Activity		Output	Short-Term Outcome	Medium-Term Outcome	Long-Term Outcome
Theory of Change	Partner with local community providers to expand programs		3 new partners per year; 5 new programs launched in region per year	More communities have programs for older adults; satisfaction	Increased access to aging in place supports at next CHNA	Reduce rate of falls in older adults; Earlier identification of dementia
Eval Qs	Process: Which outreach strategies get the most partner engagement?	Process: Partner feedback about value of the collaboration to them	Process: How many new partnerships & new programs per year	Outcome: Do older adults participate in and find new programs / supports helpful?	Outcome: Do older adults have more programs in their region with easier access?	Outcome: Are older adults in the region attaining higher health outcomes?
Data Collection Strategy (Methods)	**Quant data** Program tracking: communication strategies, # meetings held, # attended	**Quant data** (e.g., partner surveys) and/or **qual data** (e.g., interviews; focus groups)	**Program tracking** (Excel)	**Partner data:** attendance **Surveys** of program users	**Community Survey** (next CHNA) – see higher ratings of access to programs	**NH DHHS data** (fall rates; fewer ED visits from falls) **Cheshire Med data** ?

Strategy 1: Draft Outcomes

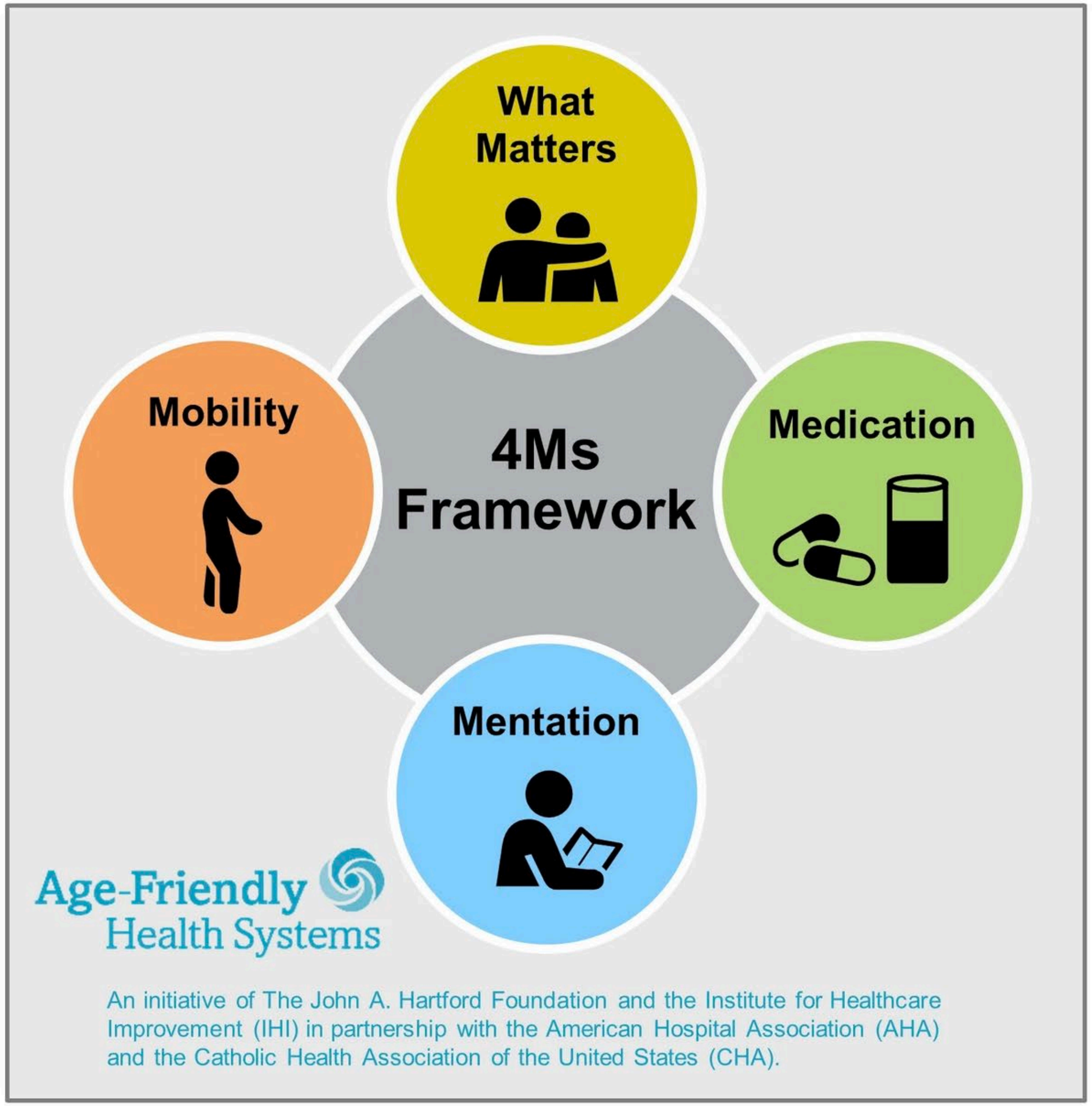
Implementation Activities	Draft Outcomes
Take steps towards becoming a **designated Age Friendly Healthcare System** and **Age Friendly Public Health System**	Number of *Trust for America's Health* accreditation rubric action items completed to become designated Age Friendly
Partner with local community providers to support initiatives and services.	Measure project milestones, Community Benefit dollars contributed
Develop and deploy community health education programs that meet the needs of older adults.	Number of programs offered, number of participants, number of high impact communities served

Strategy 1: Draft Outcomes (but are they?)

Implementation Activities	Draft ~~Outcomes~~ Metrics	Example Outcomes
Take steps towards becoming a **designated Age Friendly Healthcare System** and **Age Friendly Public Health System**	Number of *Trust for America's Health* accreditation rubric action items completed to become designated Age Friendly	1. Community is designated as "Age-Friendly" per *Trust for America's Health (or* IHI 4 M Framework) 2. Older adults receive health care
Partner with local community providers to support initiatives and services.	Measure project milestones, Community Benefit dollars contributed	1. XX **new partnerships** created to support older adults in community 2. YY **initiatives** to support aging in place launched in next 3 years 3. Reduce rate of falls by 10% among residents ages 65 and older
Develop and deploy community health education programs that meet the needs of older adults.	Number of programs offered, number of participants, number of high impact communities served	1. ZZZ adults 65 and older **attend programs tailored to seniors** in region 2. XX **communities have new program** offerings 3. >75% of survey respondents report **improved access** to programs

If the outcome is to become a designated Age Friendly Healthcare System....

4Ms Framework of an Age-Friendly Health System



For related work, this graphic may be used in its entirety without requesting permission.
Graphic files and guidance at ihi.org/AgeFriendly

define OUTCOMES that match up to the requirements

What Matters

Know and align care with each older adult's specific health outcome goals and care preferences including, but not limited to, end-of-life care, and across settings of care.

Medication

If medication is necessary, use Age-Friendly medication that does not interfere with What Matters to the older adult, Mobility, or Mentation across settings of care.

Mentation

Prevent, identify, treat, and manage dementia, depression, and delirium across settings of care.

Cognition & behavioral health screens done yearly in >90% wellness visits

Mobility

Ensure that older adults move safely every day in order to maintain function and do What Matters.

Reduce rate of falls by 10% among residents ages 65 and older

Creating a Measurement Plan

Desired Outcomes	Indicators (how will we know)	Benchmark or Target (what is our measure)	Data Sources (where is the data)	Timing
Community is designated as "Age-Friendly"	At least one IHI Age Friendly requirement is met in each of the 4 IHI domains w/in 3 years; or achieve *Trust in America's Health* accreditation	e.g., Cognition & behavioral health screens done yearly in >90% wellness visits for adults ages 65 and older (hypothetical target; check IHI or Trust for America's requirements)	Cheshire Medical Center data NH DHHS population health data	3 years
Reduce rate of falls by 10% among residents ages 65 and older	At least one IHI Age Friendly MOBILIITY requirement met Rate of ED visits and inpatient hospitalizations due to falls are lower in 3 years	Current CHNA data show that 33% of adults 65 and older reported a fall in last 12 months. 10% reduction would equate to ~23% or fewer reporting a fall in last year with next CHNA (or could also assess with ED and inpatient data)	CHNA surveys NH DHHS Wisdom data showing ED visits & hospitalizations due to falls	3 years

Case #2

Design & Use of Dashboards for Evaluation and Decision Making

Lisa C. Gloddy, M.S., HCA, MBA
Director of Physician Practices, Speare Memorial Hospital

Background

Health System developed a Chronic Care registry to:

- improve patient management
  - ➢close care gaps for patients with chronic conditions
  - ➢ensure that patient chronic illness is being treated and managed
  - ➢close the loop with patients who may be non-compliant or that may need further assistance
- track practice & provider performance
- optimize financials

Registry enabled:

Speare Primary Care (SPC) group to pull data from patient charts to view chronic conditions

Leaders to manage the information and reports in a meaningful way to impact clinical care

Tracking number of patients receiving treatment for specific conditions to tailor service offerings to those populations

Example of Registry

Broken down by chronic condition, patient details, follow up required.

Patient	BNP		CBC		Heart Failure	IN Visits Last 12 Months	ED Visits Last 6 Months	Last PCP Visit		Last ED Visit	Next Sched Appt Appointment	Next Sched Appt Facility	Next Sched Appt Resource
	59	(49)		(1)		1	1		(1)	07/31/24	09/24/24 09:30 Onc Established ...	Speare Memorial Hospital	Eric Bonnem MD
	467	(35)		(39)		1	4		(28)	08/10/24	10/23/24 10:00 SL initial consult	Speare Ambulatory Practices	Michele Gaier
									(17M)				
	1836	(147)		(65)		4	2		(50)	06/24/24			
	3342	(304)		(109)		2	1		(155)	06/02/24			
	243	(62)		(62)			2		(106)	07/19/24	09/20/24 10:00 CR cardiac rehab...	Speare Memorial Hospital	Cardiopulmonary Gyn
									(24M)				
	191	(66)		(66)			1		(99)	07/15/24			
				(135)					(38)	07/17/22	09/20/24 08:00 CA echo transtho...	Speare Memorial Hospital	Cardiology Lab
	105	(219)		(14)		2	1		(136)	09/03/24	11/11/24 11:00 30 min Est Offic...	Speare Ambulatory Practices	Nancy Quintero, MD
	180	(16M)		(12M)					(112)	09/12/23			
									(132)	08/17/23			
	308	(17)		(17)		4	6		(13M)	09/02/24			

Created Chronic Care Dashboard to View/Use Data

Initial "evaluation" questions for Registry data:

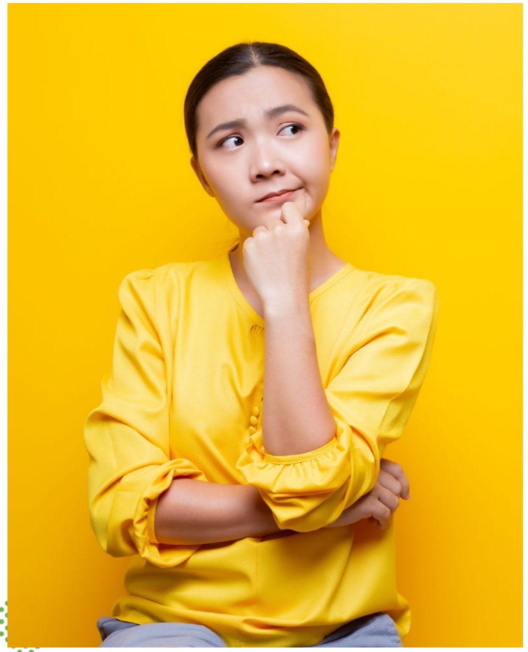
How are provider teams doing at managing the care of patients with chronic conditions?

- Are chronic patients receiving regular/timely monitoring?
- Are patients receiving the appropriate tests?

A year later…

Dashboards in place with some utility for initial goals, but

Measures ***didn't capture*** **quality** of care



What WOULD be the best measures?

How to identify the best measures?

Get the right people at the table

Reframe the questions

Are patients getting services → Are we improving quality of care in encounters?

Identify quality measures for each condition

Benchmark to national and state quality standards

Ex. % of patients between 18-25 years with a kidney health assessment

Any other considerations?

Redesigned Quality Measures & Targets

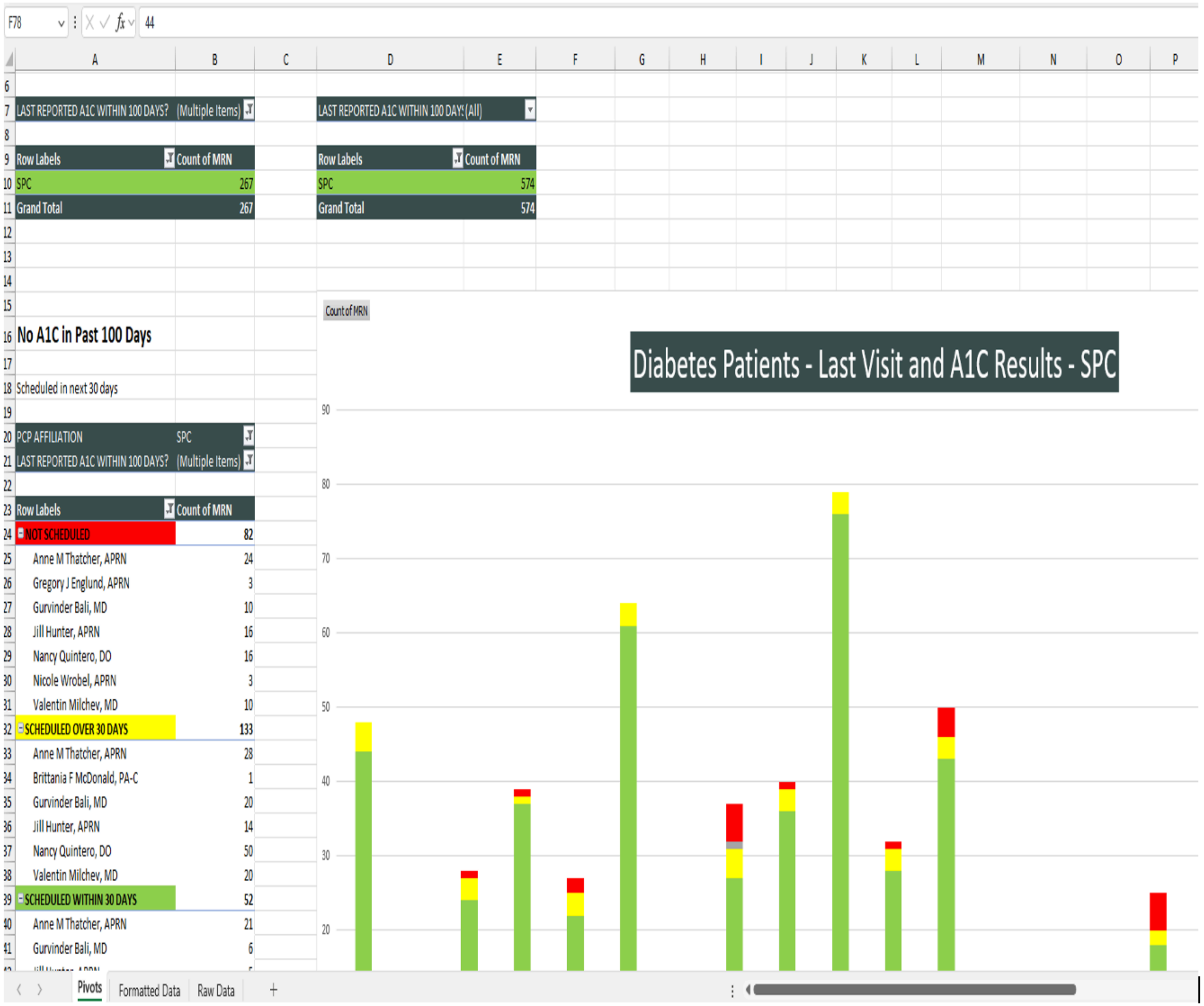
Goals	Measures	Improvement Target
Improve care of CHF	• smoking cessation education (code Z71.6 -Tobacco Abuse Counseling) • dietary education to resist sodium intake to 3g/day (code Z71.3)	Annual education provided
Improve care of COPD	• smoking cessation education (code Z71.6 -Tobacco Abuse Counseling) • proper use of medication inhaler technique (CPT 94664) • seasonal flu and pneumococcal vaccination (EMR)	Annual education provided; Compliance with vaccines annually
Improve Diabetes Care	• monitor blood pressure every visit with a goal of <130/80 (patient's EMR; MA data entry) • annual foot exam (PCP enters encounter code Z01.89 for the foot exam and date) • Microalbumin test done annually	BP < 130/80 Annual tests
Increase annual Wellness Visits	• EMR data • Requirements for billable annual visit met	5% increase; no denials

Use of Dashboards

Leaders

Physician Advisory Group

Practice Teams



Questions & Discussion

Thank you for participating!

- Post course survey: https://redcap.hitchcock.org/redcap/surveys/?s=HWFJE3C7L4TXTP7R
- Recordings will be posted on the D-H ECHO website https://www.dartmouth-hitchcock.org/project-echo/enduring-echo-materials