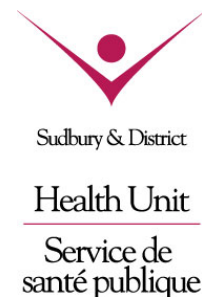


Annotated Inventory: Background Report

**Public Health Research, Education and
Development (PHRED) Program**

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This report is available online at: www.sdhu.com

See also the companion document: *Annotated Inventory of Evaluation Tools and Resources*, also available at www.sdhu.com

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Background to the Annotated Inventory Project

With the release of the Ontario Public Health Standards (OPHS) in 2008, there are changes in the context, terminology, needs and requirements for program evaluation in public health. The Ontario Public Health Research Education and Development (PHRED) Program initially planned to produce a revised edition of *A Blueprint for Public Health Management: A Program Evaluation Toolkit* (the “Toolkit”) with updated OPHS context and language. However, during the consultation process as a first step of this project, key informants in the Ontario public health field mentioned a need for an annotated inventory that would guide practitioners and evaluators through the many available resources on program evaluation. In response to this articulated need, an annotated inventory of evaluation tools and resources was undertaken by the Ontario PHRED Program in order to support Ontario health units by directing them to quality resources related to program evaluation.

The environmental scan and consultations that led off the project were extremely useful and resulted in the articulation of some guiding principles for program evaluation resources in Ontario public health, which may be of interest for others working in this field. Thus, this report presents a summary of the environmental scan and the resulting guiding principles, as well as background information about the *Annotated Inventory of Evaluation Tools and Resources* (available online), which describes resources that are applicable and relevant to the current context of public health in Ontario.

The Toolkit

A Blueprint for Public Health Management: A Program Evaluation Toolkit was developed in 1997 and has been a key resource for public health program evaluation over the last decade. The Toolkit was funded by the Public Health Research, Education and Development (PHRED) Program in partnership with the Ontario Ministry of Health. The Toolkit was developed in response to the identified need for guiding principles for program evaluation in Ontario public health units and the need for an educational resource that would be applicable and accessible to all health units.

Key Informant Interviews

As an initial step in the revision of the Toolkit, the project team undertook a series of key informant interviews. Key informant interviews were conducted in order to develop a comprehensive understanding of the needs of the public health field as they relate to program evaluation. Interviews were conducted on a group and individual basis in order to accommodate the availability of participants. Individual interviews were conducted with public health practitioners representing a wide variety of positions within the public health field including: program managers, program evaluators, program directors and Medical Officers of Health. Group interviews were conducted with a group of representatives from the Ministry of Health and Long-Term Care and the Ministry of Health Promotion, a group of PHRED representatives from across the province, a group of PHRED and non-PHRED staff at SDHU responsible for or involved in program evaluation related activities, and a group of public health managers. The session with public health managers was held after the launch of the Ontario Public Health Standards to develop an understanding of the emerging program evaluation needs of the

field in the context of implementing the new Standards. Most interviews (group and individual) were conducted via teleconference with the exception of the interviews held at SDHU and with program managers, which were conducted in person.

Interviews were fairly informal and covered the following information/topics:

- Perceived needs in the public health field regarding program evaluation,
- Information gaps in the field re program evaluation,
- Effective format/ means to provide information to the public health field,
- Program evaluation resources that are currently available and being used in public health.

The information gathered through the key informant interviews provided valuable insight into the program evaluation needs in the field and how public health practitioners felt those needs could be met.

Guiding Principles

The project team also sought feedback on a set of guiding principles for the project. These guiding principles were developed to provide direction and inform decision making during the course of the project, and to provide an overall description of important features of program evaluation resource needs in the Ontario public health context. The guiding principles for the program evaluation resource project were as follows:

- Grounded in public health context and practice (e.g. OPHS; public health examples)
- Relevant to meeting the demands faced by public health practitioners
- Presented using similar format and language to OPHS; linked explicitly to the OPHS and related resources
- Developed using adult learning principles (e.g., self-directed; build on existing knowledge)
- Interactive (e.g., examples, hot links, templates) and web-based
- Connected to broader context of program planning and implementation in public health
- Flexible usage (e.g., can be used to guide a project from beginning to end, or to dip into as needed)
- Cover many types of evaluation (qualitative, quantitative, formative, process, outcome, participatory, etc.)
- Meets needs of many types of users (front-line staff; evaluators; managers)
- Meets needs of different experience levels of users; relevant to more advanced, experienced users
- Connected to larger context of program planning and implementation in public health
- High profile in public health community (potential users are aware of the resource)
- Not a duplication of other existing resources
- Can be stand alone or used as a support to workshop presentations/training

Change in Direction

Although revisions to the Toolkit were the original plan, key informants advised that the Toolkit continues to be valuable in its current form. Due to the number of program evaluation resources currently available to public health practitioners, and in recognition that a number of organizations in Ontario were currently in the process of developing additional program evaluation resources, the PHRED project group decided not to duplicate existing resources or to revise the Toolkit. An identified gap was a resource that could guide potential users through the large number of existing program evaluation guides. In order to meet that gap, an annotated inventory of program evaluation resources and tools was developed. This revised project outcome capitalizes on PHRED's strengths and expertises in program evaluation grounded in public health. Additionally, this revised project outcome will avoid duplication while still responding to the needs identified by key informants.

In the initial stages of the project, an environmental scan was conducted to identify electronic program evaluation resources (such as toolkits, workbooks, manuals, guides) that are currently available to public health practitioners. Key informants highlighted many program evaluation resources that public health professionals currently use and find relevant to their practice. In addition to seeking recommendations for resources from key informants, national and international public health websites were searched for program evaluation resources applicable to the public health context.

The environmental scan resulted in the identification of 58 electronic program evaluation resources relevant to public health. Detailed information about each resource was entered into a searchable Access database (see Appendix A for the categories).

Developing an Annotated Inventory

In order to determine which resources to include in an annotated inventory of program evaluation resources, a critical review of the available resources was conducted. The objective was to describe a small number of recommended resources. The decision was made to limit the search to electronic resources to ensure that the resources identified would be accessible to all Ontario public health units.

Three criteria that reflect feedback received from key informants were considered in the critical review of evaluation resources for inclusion in the annotated inventory:

- 1) Quality of the Information
 - Information has to be accurate, reflect good evaluation practice and be consistent with accepted evaluation concepts and standards (utility, accuracy, propriety, feasibility).
- 2) Applicability to Public Health in Ontario
 - Was the resource designed specifically for public health practitioners, in Ontario?
 - If not, can the context be transposed into public health scenarios relevant to the Ontario context?

- Are public health examples included in the resource?
 - If not, can the examples be understood in a public health context?
- Does the resource address the principles of the Ontario Public Health Standards (Need, Impact, Capacity, and Partnership and Collaboration)?

3) Ease of Use

- Resource must be written in clear, plain language that is easy to understand, organized logically, easy to navigate, and presented in a visually appealing manner.

Content of the Annotated Inventory

The annotated inventory of program evaluation resources includes twelve resources that met the review criteria. The presentation of the resources consists of two parts: a summary table and individual resource summaries.

Summary Table

The summary table provides an overview of all the resources included in the annotated inventory. It identifies the title of the resource and the organization that produced it, the focus of the resources or who the resource was developed for, whether the resource is available in French, the user group (based on extent of previous experience with program evaluation) that would benefit from the resource, and whether the resource is a workbook that will walk the user through the process of conducting a program evaluation.

Resource Summaries

The individual resource summaries provide more in-depth information about the program evaluation resources. The individual summaries contain the following information:

- Description of the resource – this information is often taken directly from the resource and outlines its intended use. Information about the overall content of the resource is also included
- Several fast facts about the resource (Organization, format, year of publication, number of pages and a link to the resource on the internet)
- Reviewer’s comments – provides general overview of the resource including helpful hints about navigating through the information as well as important/distinguishing features of the resource
- Noteworthy sections – identifies key topics, examples and information that are included in the resource, to help guide users to a resource that will best meet their needs.

The reader is encouraged to consult the *Annotated Inventory of Evaluation Tools and Resources*.

Appendix A: Information collected in the Microsoft Access Inventory of Evaluation Resources

Bibliographic Information

- Title
- Author
- Organization
- Year of Publication
- Description
- Resource Format (Website, .pdf, and/or word document)
- Web Address
- Is the resource part of a series?
- If so, title of other resources in the series
- Quality Filter (meets annotated inventory inclusion criteria or not)
- Target Audience for the resource

Information Covered in the Resource

- Evaluation Type/Focus
 - Formative Evaluation
 - Process Evaluation
 - Outcome Evaluation
 - Participatory Evaluation
 - Cost-Effectiveness Evaluation
 - Situational Assessment
 - Evaluating Programs
 - Evaluating Policies
 - Evaluating Partnerships
 - Evaluating Media Campaigns
 - Evaluating Health Promotion Initiatives
 - Evaluating Health Protection Initiatives
 - Step-by-Step Evaluation Guide
- Evaluation Components
 - Data Analysis
 - Data Collection
 - Data Quality
 - Engaging Stakeholders
 - Focusing an Evaluation
 - Indicator Selection
 - Measurement Selection
 - Disseminating Results
 - Report Writing
 - Logic Models
 - Evaluation Planning
 - Program Planning
 - Sampling
 - Questionnaire Development
 - Qualitative Methodology
 - Quantitative Methodology
 - Research
 - Program Monitoring
 - Surveillance
- Noteworthy Sections
 - Diagrams and Models
 - Examples
- Reviewer's Comments