



Evaluation Planning and Implementation

March 5, 2024

CDC Foundation

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Logistics

- Minimize distractions
- Ask questions and engage using the **Question and Answer** feature
- Slides and recording will be shared on <https://www.cdcfoundation.org/programs/improving-maternal-infant-health-health-care>



What is Evaluation?

It is a data-driven process to understand an initiative and its qualities.

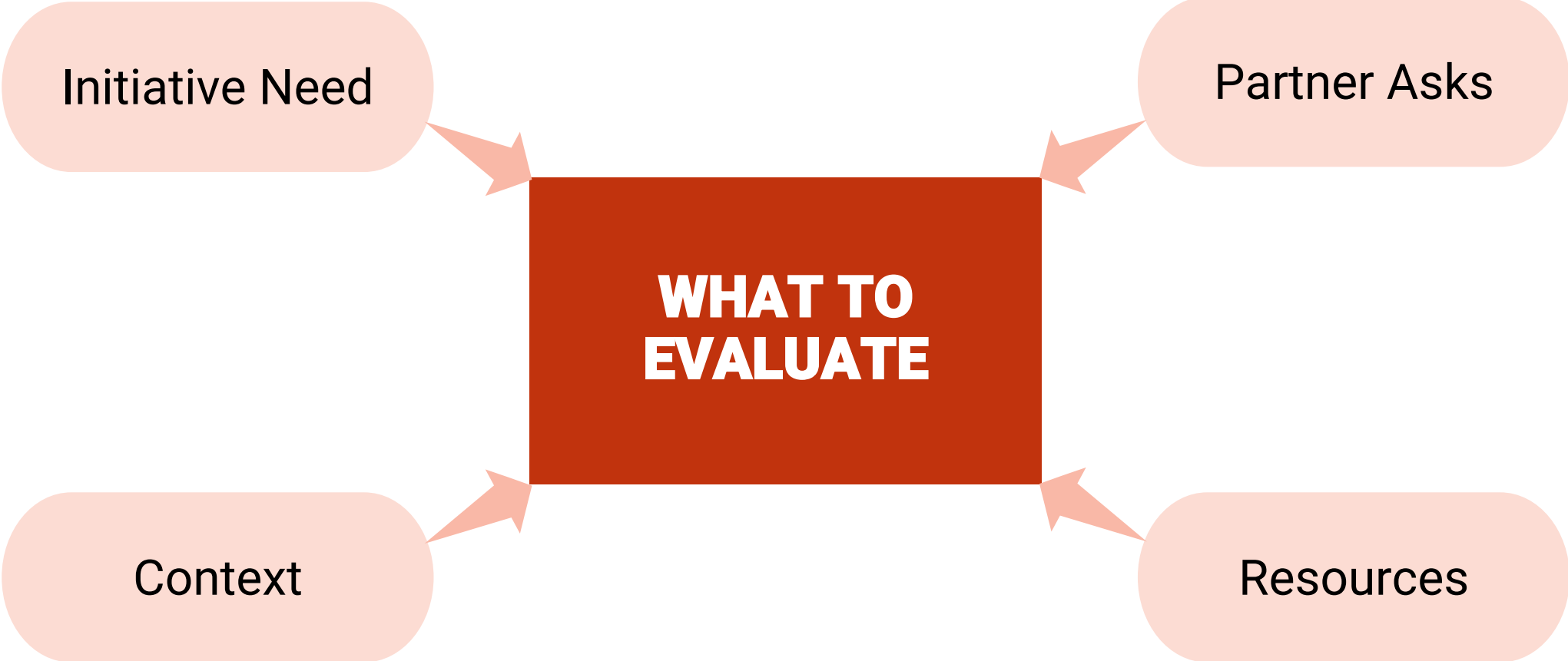
It involves collecting data to answer specific questions.

It is planned and purposeful.

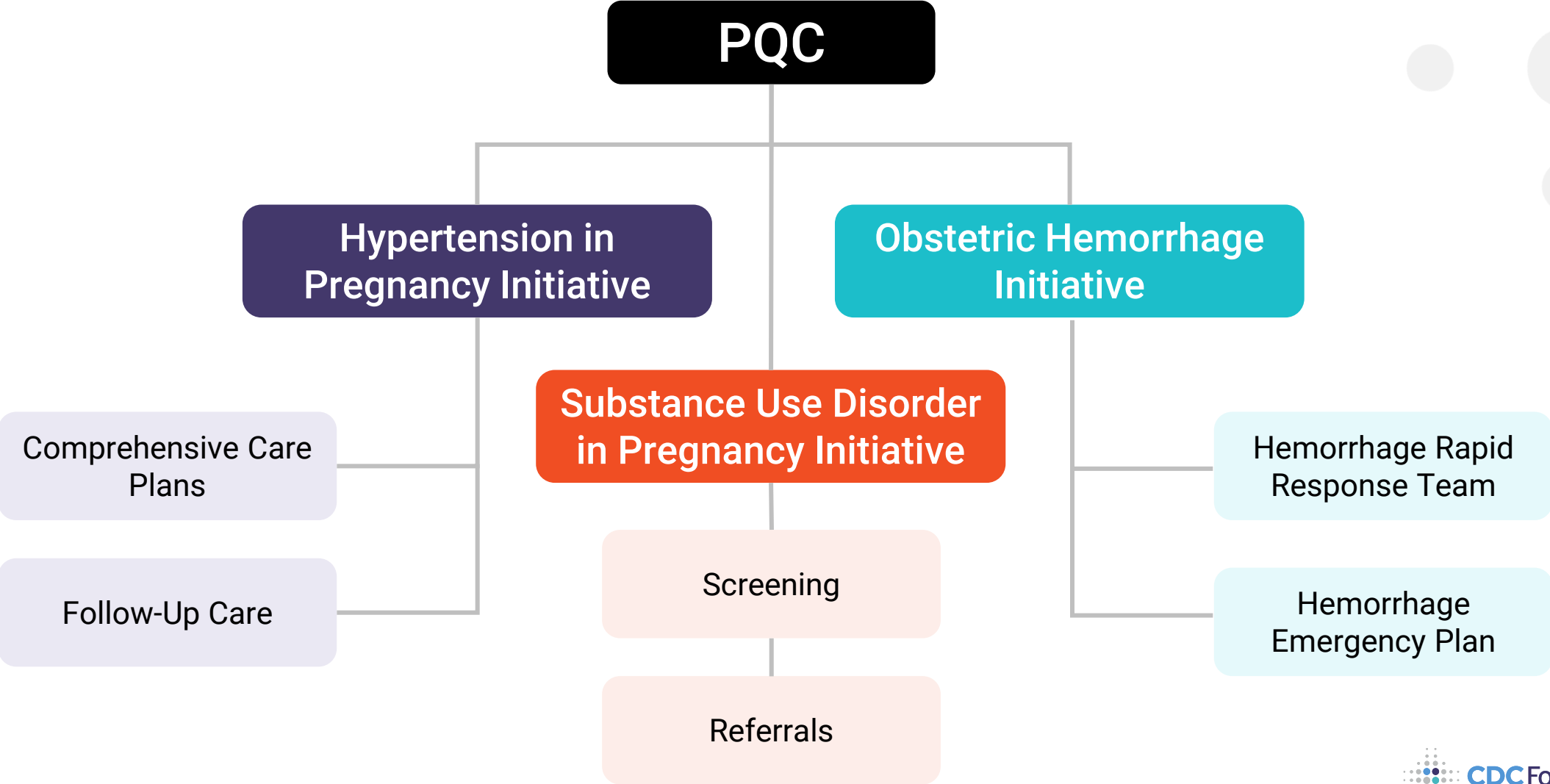
It can help inform decisions for the future.

Evaluation is an opportunity to understand more about the initiative, your organization and how to best serve your community

What to Evaluate?



Choosing What to Evaluate



Choosing What to Evaluate

Initiative	Initiative Need	Partner Ask	Context	Resources
Hypertension in Pregnancy	Understand how the new initiative is going and if it should continue	Leadership is interested in if they should scale up	Attention and pressure from community and board to reduce preeclampsia	Data collection and management plan is in place; four individuals able to help evaluation
Substance Use Disorder (SUD) in Pregnancy	Understand if patients are following up with referrals and if not, why not	Staff is interested in learning about outcomes of referrals	Stigma associated with SUD and only few community resources are available	No referral tracking system in place and minimal evaluation resources available
Obstetric Hemorrhage	No strong immediate need for evaluation, initiative is established across the state	Partners want regular reports on hemorrhage cases	Initiative has been implemented for five years now and has strong buy-in from partners	Strong evaluation and reporting built into programming with full-time evaluator

Evaluation Steps

Define What You Are Evaluating

Provide an overview of the initiative, including its objectives, components and context

Focus the Evaluation

Specify what aspects to assess and the methods to be used

Gather Evidence

Collect relevant data and evidence to assess the initiative effectiveness and outcomes

Summarize and Use Findings

Analyze the gathered evidence and use the findings to inform decisions, improve the initiative and guide future actions



Evaluation Standards

Utility

identifies the practical value of conducting an evaluation

Feasibility

determines what type of evaluation is possible given time, resources, etc.

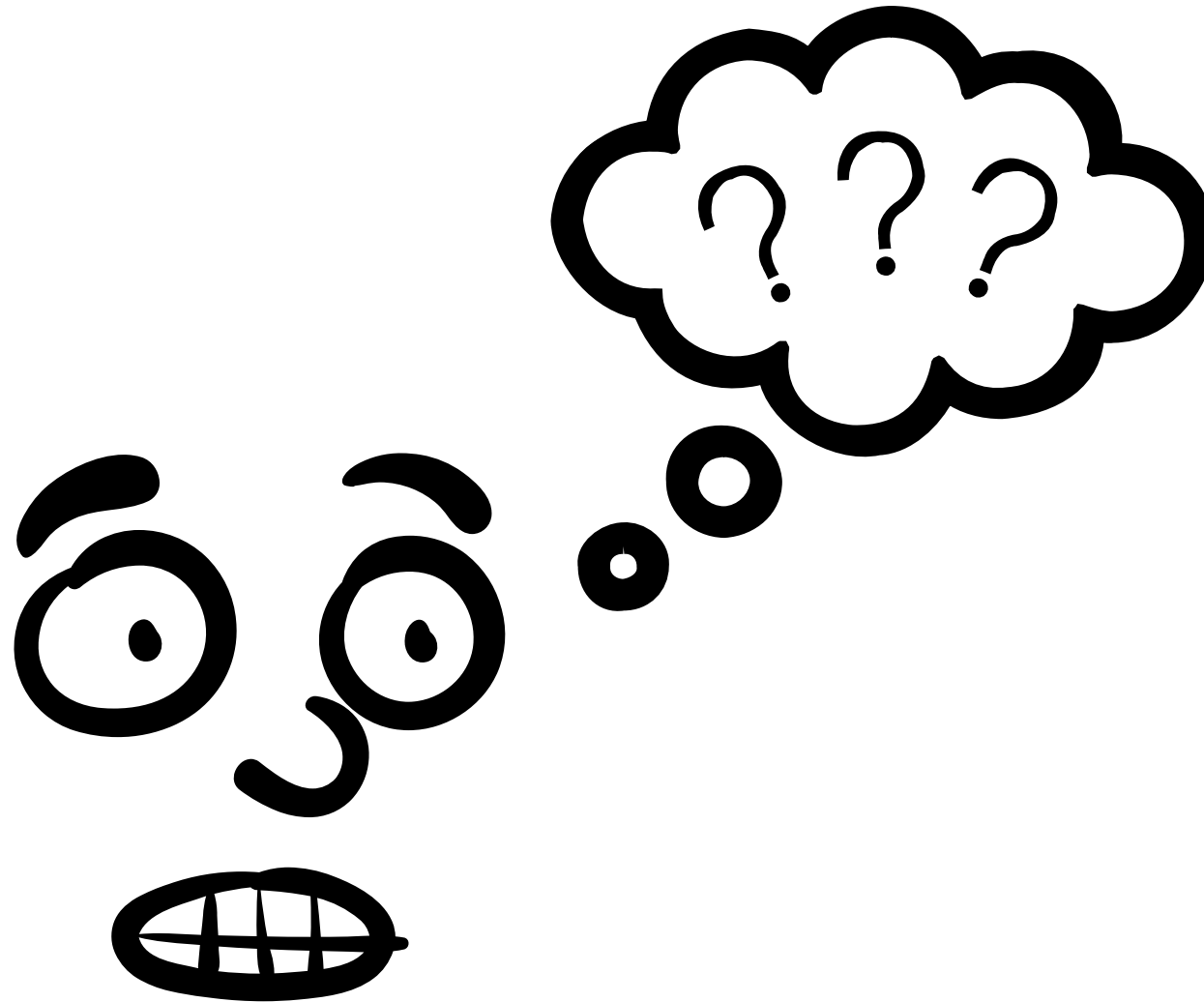
Propriety

determines if the evaluation is ethical to avoid causing undue harm

Accuracy

ensures that evaluation is conducted using best practices for evidence

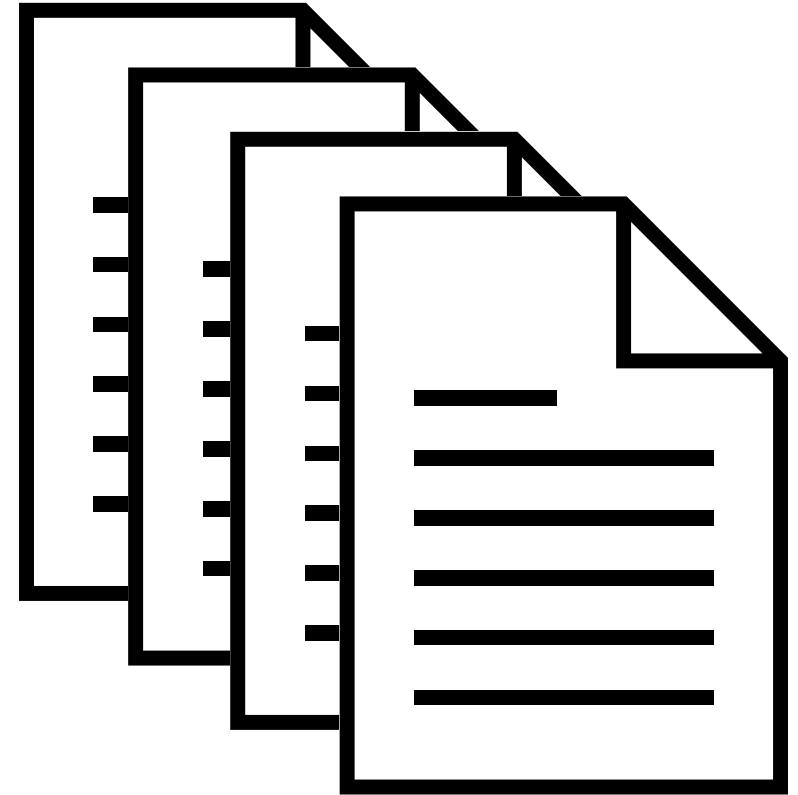
Plan for an Evaluation



What is an Evaluation Plan?

- An evaluation plan describes:
 - **What** you are evaluating
 - **How** you will evaluate
 - **Who** is doing what
 - **How** the evaluation will be used
 - **Why** the evaluation matters

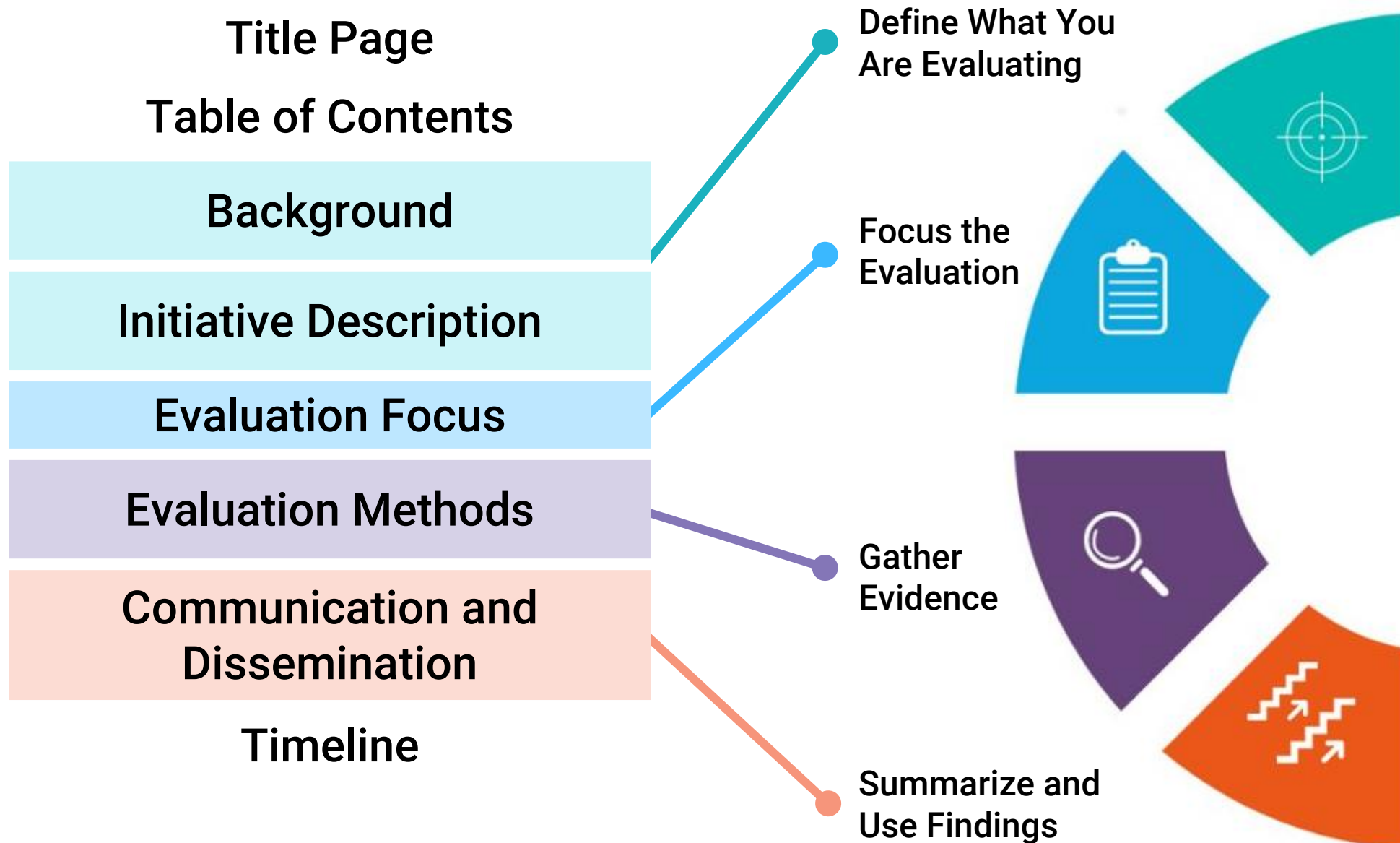
Adapt your evaluation plan as the context or initiative being evaluated changes



Sections of the Evaluation Plan

Title Page	Title, name, author, date of plan and timeframe for evaluation	1 page
Table of Contents	List of sections and associated page numbers	1 page
Background	Brief description of the PQC and perinatal and infant health priorities for the PQC	2 paragraphs
Initiative Description	Description of QI initiative activities, goals, stage of development, partners engaged and interested, population	1-3 paragraphs per initiative being evaluated
Evaluation Focus	Evaluation purpose and key evaluation questions	1-2 paragraphs per initiative
Evaluation Methods	Data collection & analysis plans including indicators, data sources, instruments used to capture information, etc.	1-4 paragraphs with 1-3 tables per initiative
Communication and Dissemination	Description of how the findings will be shared and used	1-2 paragraphs per initiative
Timeline	List of activities, timing and party responsible	1 table

Sections of the Evaluation Plan



Example: Hypertension in Pregnancy Initiative

Hypertension in Pregnancy Initiative

Individualized Care Plans

The initiative involves promoting the development and implementation of comprehensive care plans for individual patients. The care plans:

- Specify protocol for detection
- Identify and address risk factors
- Outline care steps

Follow-Up Care

The initiative also involves using case managers to ensure patients with hypertension in pregnancy continue post-partum management of hypertension.

Background

Length: 2 paragraphs

1

Background information on the PQC

Mission and Vision

Major Priorities

Partnerships

Other Context (e.g., PQC Structure, Funding, etc.)

2

The perinatal health need being addressed by the quality improvement (QI) I initiative

Causes of Perinatal Mortality and Morbidity

Describe Perinatal Health Disparities, Under-Addressed Issues, etc.

Background: Hypertension in Pregnancy Initiative

The PQC was established ten years ago. The PQC is hosted out of an academic partner and has active collaborators from the state health department. The PQC's vision statement is that all birthing people and infants in the state will have the best health outcomes through high-quality, data-driven perinatal care. The mission statement is to improve maternal and infant health in the state through implementing evidence-based perinatal initiatives, conducting quality improvement cycles, and strengthening collaboration between partners across the state. The PQC implements QI initiatives in 85% of birthing hospitals in the state to achieve this.

32% of maternal deaths in the nation had documented hypertension (Ford et al. 2022). Hypertension in pregnancy is disproportionately high among Black and American Indian and Alaska Native pregnant people (Ford et al. 2022).

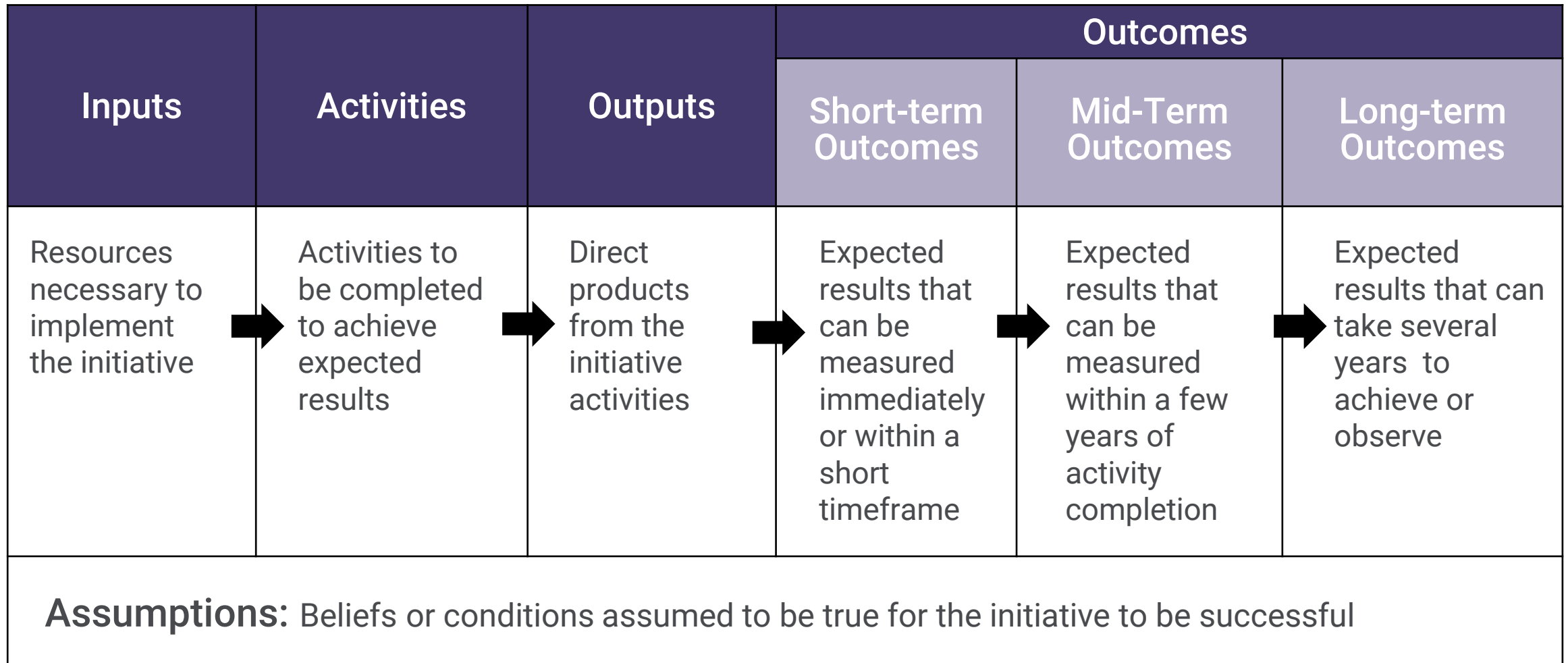
QI Initiative Description

Length: 1-3 paragraphs
per initiative

- What need is being addressed by the initiative?
- What is the initiative's population of focus?
 - How is it engaging facilities that serve populations disproportionately impacted by adverse perinatal outcomes?
- What is the history of the initiative?
 - How long has it been in place? Over what years?
 - Is it being piloted or fully implemented?
 - Is it adapted from another initiative?
- What are the expected goals and outcomes of the initiative?
- What are the activities of the initiative?

Build a Logic Model

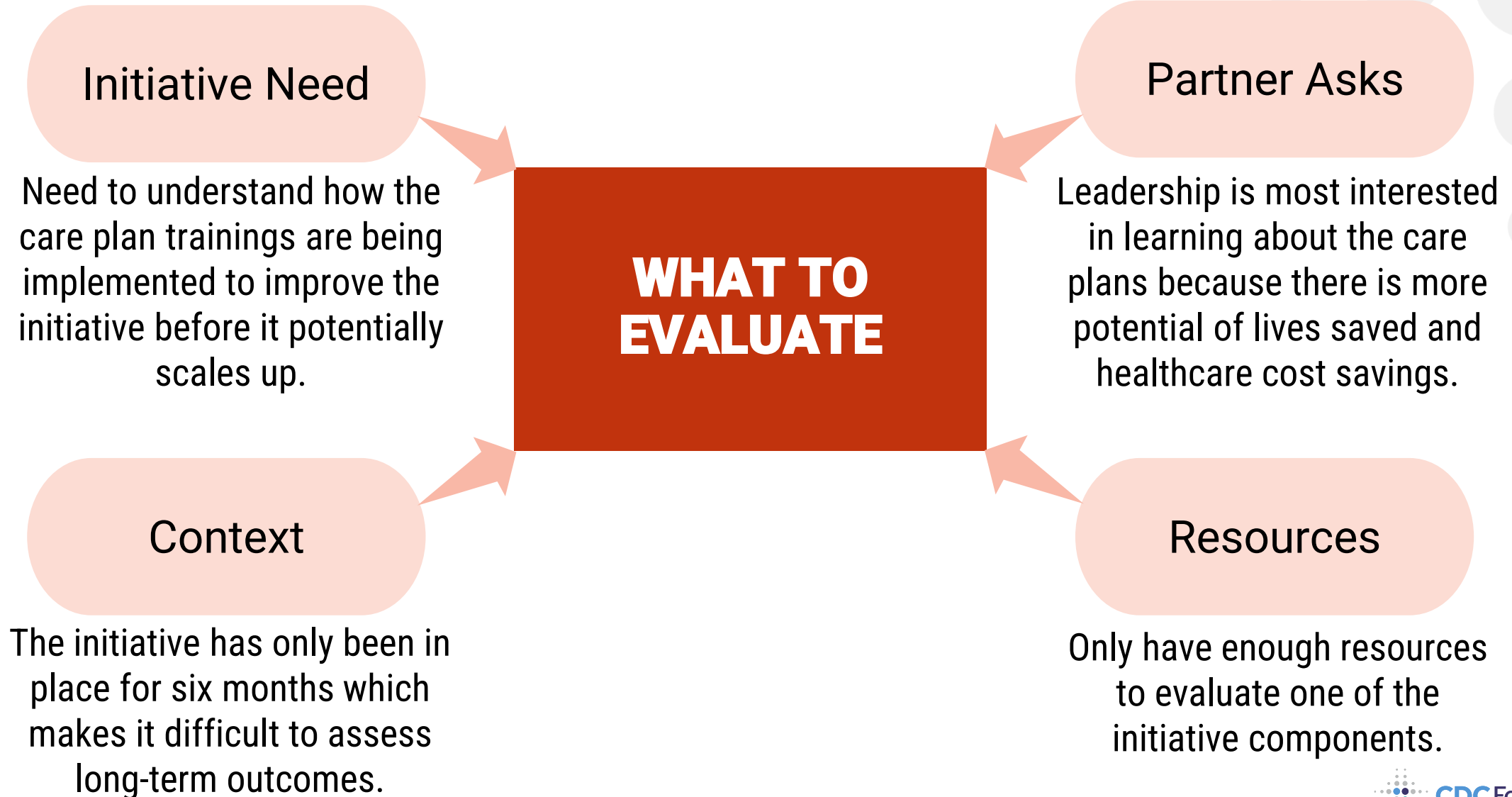
If *this* happens - then *that* happens next



Quality Improvement Initiative Description

The goal is to **reduce preventable morbidity and mortality due to hypertensive disorders** in pregnancy in the state. The initiative will deliver service to pregnant people in three rural hospitals across the state. It has been **in place for six months** and will be in place for two total years. The initiative aims to **reduce complications due to hypertension in pregnancy** through increasing detection, reducing risk factors and providing appropriate care. This involves **training clinicians** via webinars and resources to **develop individualized care plans** for pregnant patients with hypertension. The initiative also involves a **case management system to promote postpartum follow-up care**.

What to Evaluate?



Evaluation Focus

Length: 1-2 paragraphs
per initiative

- What is the initiative's stage of development?
- What is the purpose of the evaluation?
- What type of evaluation aligns with your purpose?
- Who will use the evaluation findings?
- What evaluation questions will anchor this evaluation?

Currently implementing the initiative

Learn how the trainings are working and if the care plans are being implemented as planned

Process evaluation

Implementers and PQC leadership

?

Evaluation Questions

- **Build** on the purpose of your evaluation
- Are **informed by** your partners, staff and community members
- Are **open ended** and allow for exploration:
How? To what extent? Why? Why not?
- Must reflect the initiative's **stage of development**

Once evaluation questions are identified, they can be used to anchor your evaluation activities

General Evaluation Questions by Evaluation Type

Formative

Who has the need?

What is the need?

What type of initiative can we implement to meet this need?

How can we best implement the initiative to meet this need?

Process

How and to what extent is the initiative implemented as planned?

Who is being reached and how are they reached?

What resources are utilized, and how?

What resources are still needed?

Outcome

What were the outcomes of the initiative?

In what context was the initiative most successful?

To what extent can the outcomes be attributed to the initiative?

What was the initiative's impact?

QI Evaluation Questions by Evaluation Type

Formative

- What type of QI initiative can we implement to meet the need to address severe hypertension in pregnancy?

Process

- To what extent is the hypertension care plan process working and how can it be improved?

Outcome

- How effective has the hypertension initiative been at reducing hypertension related morbidity and mortality among pregnant and post-partum people?
- What is the return on investment of the hypertension initiative?

Potential Evaluation Questions

What are the barriers to adhering to care plans?

What are patients' perspectives toward their care plans?

To what extent are the hypertension care plan activities functioning as intended?

What recommendations do case managers have for the design of care plans?

Assessing Evaluation Questions

Utility

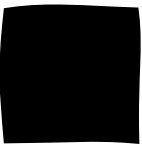
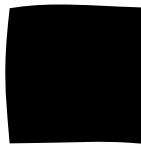
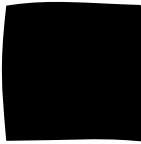
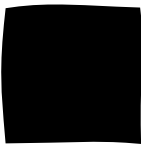
Feasibility

Propriety

Accuracy

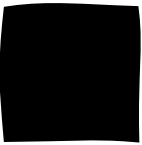
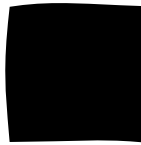
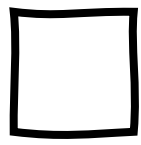
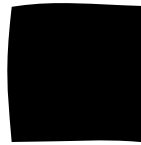
QUESTION A

What are the barriers to adhering to care plans?



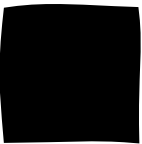
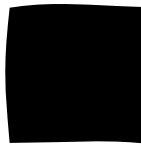
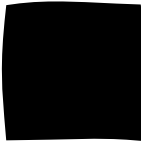
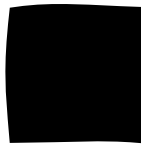
QUESTION B

What are patients' perspectives toward their care plans?



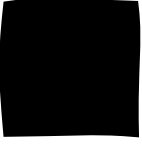
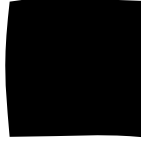
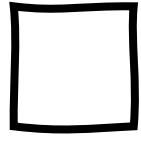
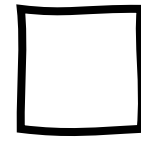
QUESTION C

To what extent are the hypertension care plan activities functioning as intended?



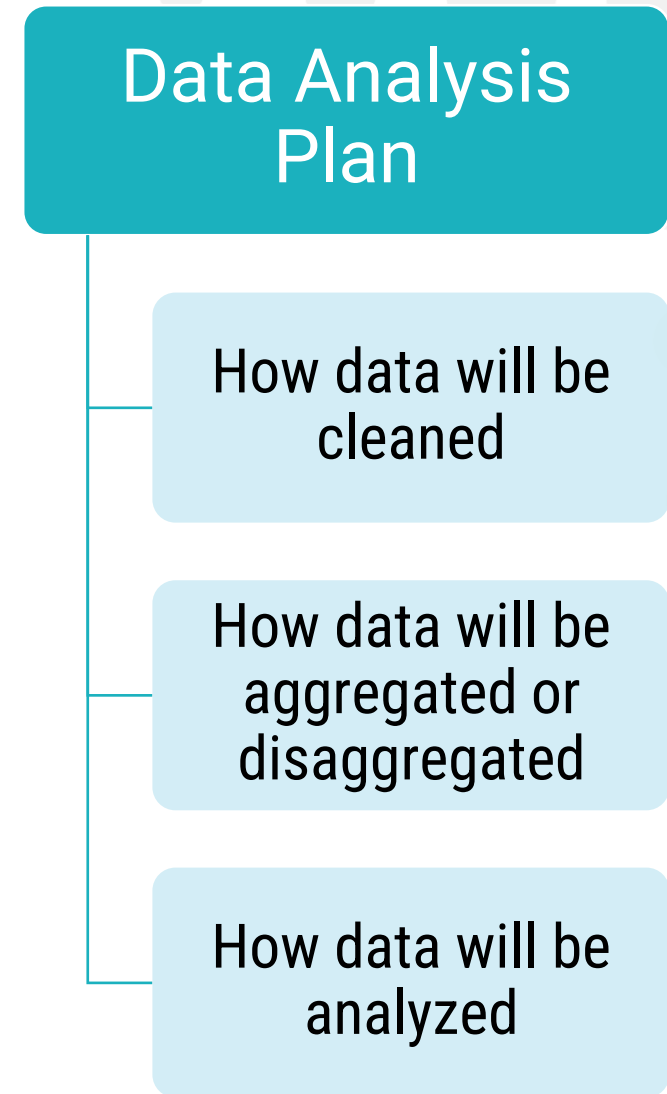
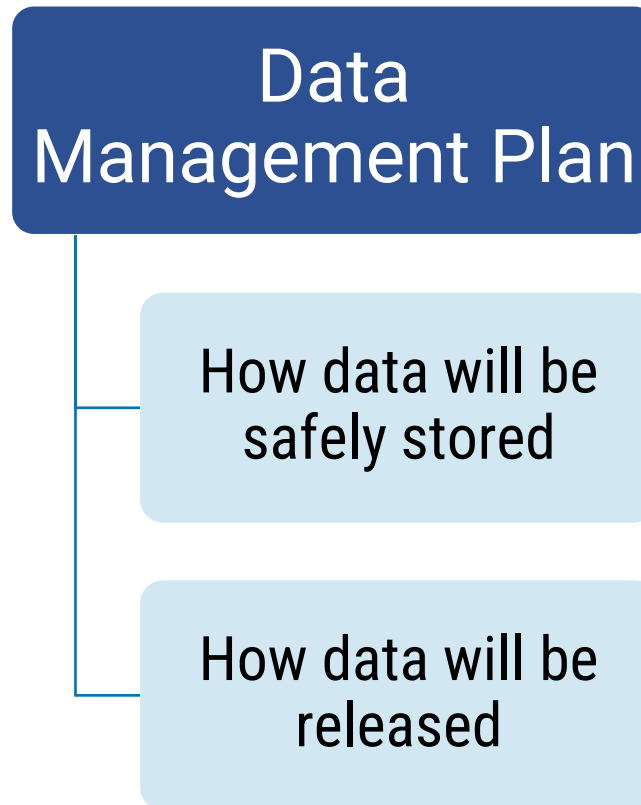
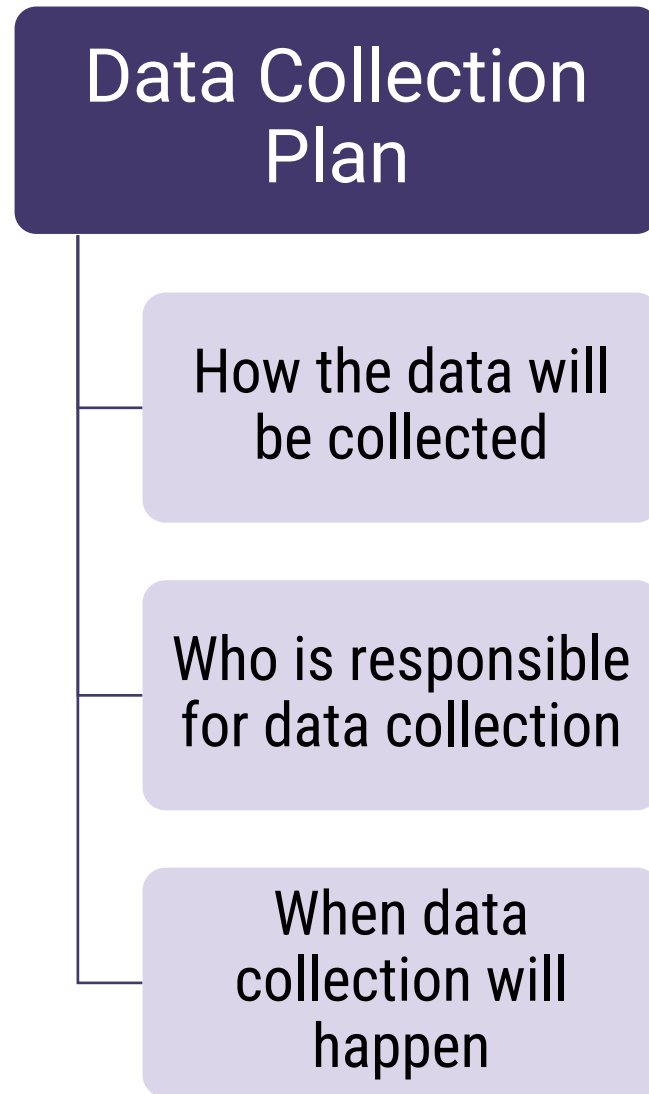
QUESTION D

What recommendations do case managers have for the design of care plans?



Planning of Evaluation Methods

Length:-1-4 paragraphs supported by 1-3 tables per initiative



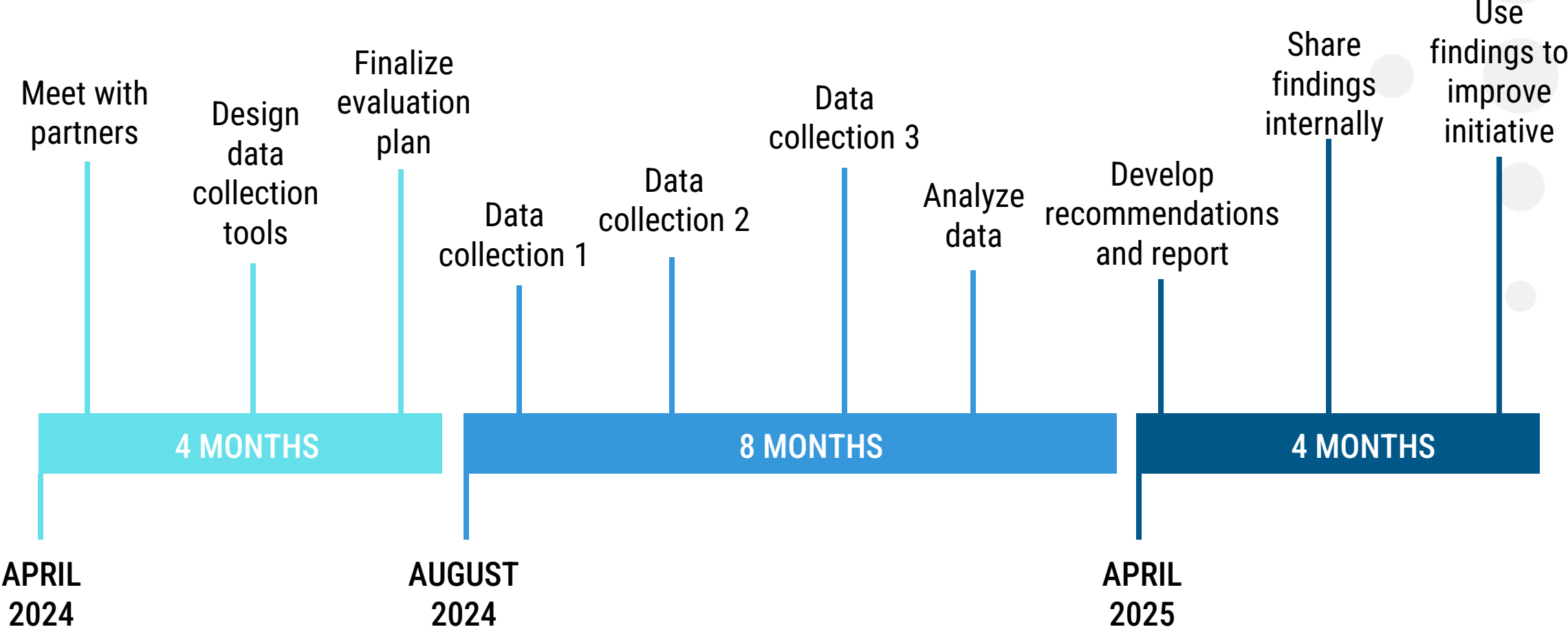
Summarize and Use Evaluation Findings

- Evaluation findings help improve activities and communicate the initiative's outcome and values
- Before implementing the evaluation, you should have a plan for how the evaluation findings might be used and who might use them
- The communication and dissemination plan identifies:
 - How the findings will be shared with different audiences
 - How each audience may act on the findings
 - Who will be responsible for sharing findings
 - When will the findings be shared

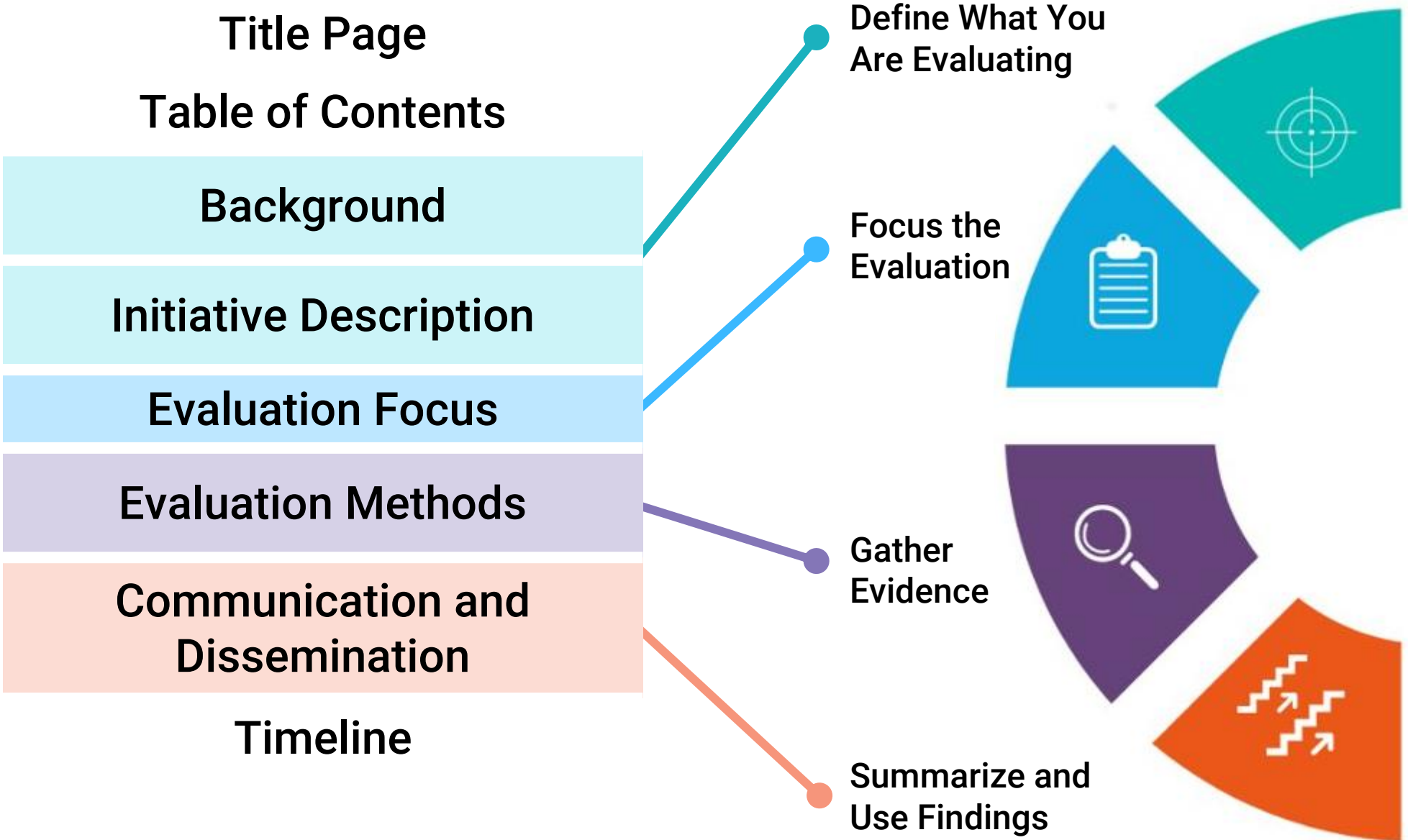
Length: 1-2 paragraphs

Timeline

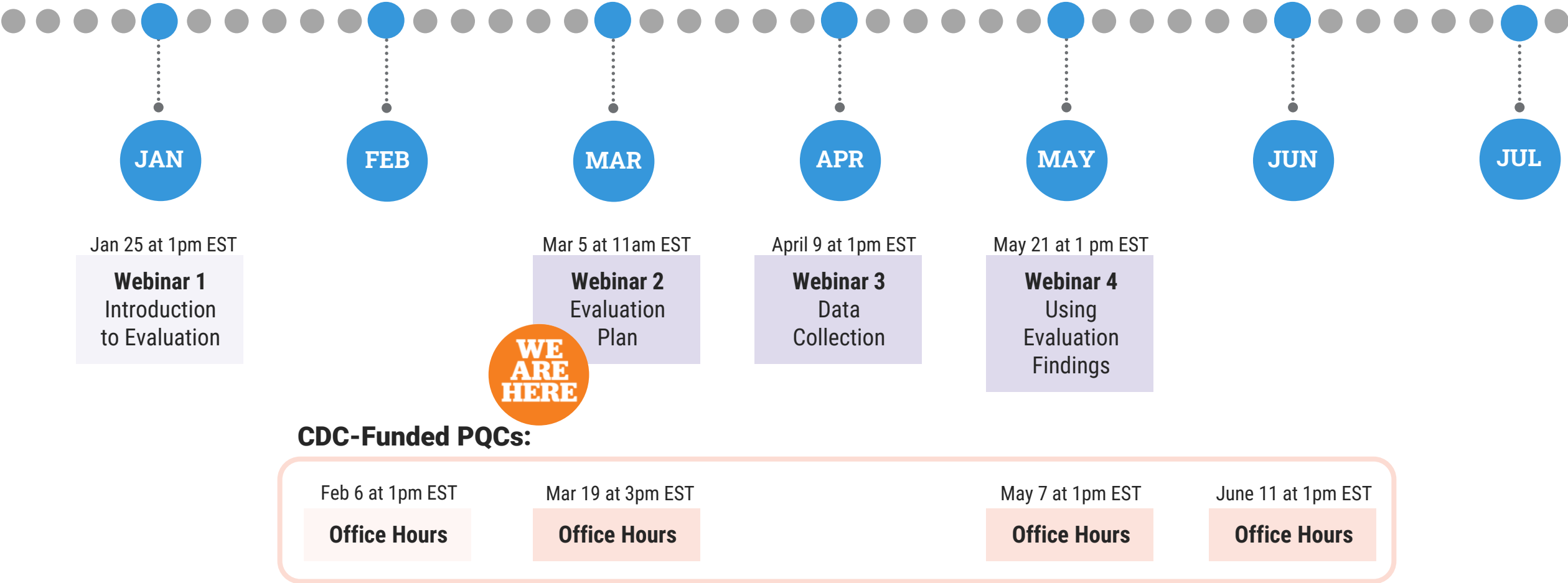
Length: 1 table



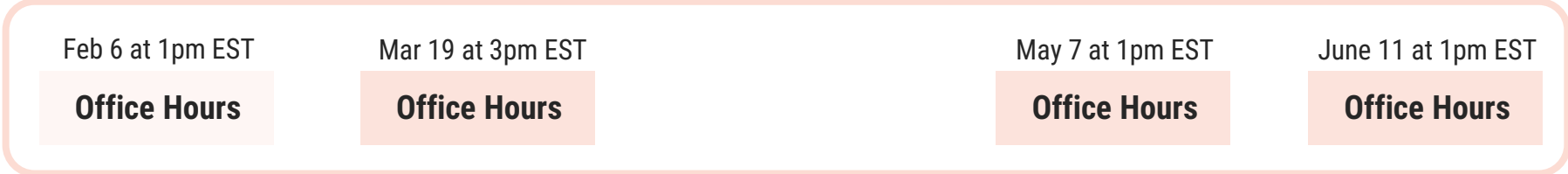
Steps for Evaluation and Evaluation Plan Components



Next Steps: 2024 Training and Technical Assistance Timeline



CDC-Funded PQCs:



Questions

Additional questions can be directed to MaternalHealthTTA@CDCFoundation.org

Learn more at our website www.cdcfoundation.org/programs/improving-maternal-infant-health-health-care

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