Territorial Honouring

The Palliative Care ECHO Project

The Palliative Care ECHO Project is a 5-year national initiative to cultivate communities of practice and establish continuous professional development among health care providers across Canada who care for patients with life-limiting illness and their families.

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The Palliative Care ECHO Project is supported by a financial contribution from Health Canada. The views expressed herein do not necessarily represent the views of Health Canada.

Health Canada   Santé Canada

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Welcome & Reminders

- Please introduce yourself in the chat! Let us know what province you are joining us from, your role and your work setting.

- Please submit questions through the Q&A function.

- Your microphones are muted. There will be time during this session when you can unmute yourself for questions and discussion.

- You are welcome to use the chat function to ask questions and add comments throughout the session.

- This session is being recorded and will be emailed to registrants within the next week.

- Remember not to disclose any Personal Health Information (PHI) during the session.

Disclosure

This program has received financial support through In Kind Contributions from:

Presenters:

- Bonnie Tompkins: nothing to disclose.
- Eman Hassan: nothing to disclose.
- Emilie Lessard: nothing to disclose.

Disclosure

Relationship with Financial Sponsors:

Pallium Canada

- Not-for-profit
- Palliative Care ECHO Project Funded by Health Canada

BC Centre for Palliative Care

- Not-for-profit
- Funded by BC Ministry of Health

Introductions

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Agenda

- Who is the 'Guide' for?
- Purpose of the Guide
- Resources included
- How to use the Guide?

- Questions

compassionate communities

Evaluation Guide

Version year: 2023

BC Centre for Palliative Care

Pallium Canada

HPCO
Hospice Palliative Care Ontario

Compassionate Communities Evaluation Guide

Primary audience:

Anyone starting or leading a Compassionate Community initiative <u>and</u>

wants to know how to develop an evaluation plan that can help them clarify their goals, measure their progress and communicate their results.

Secondary audience:

Anyone staring or leading a community-led initiative

Purpose: the Guide helps you..

- **Learn** about compassionate communities and the current initiatives across Canada.
- **Understand** basic evaluation concepts.
- **Describe** your initiative, including goals, target audience, activities, and expected outcomes, and current stage.
- **Choose** the right evaluation approach for your initiative's stage.
- **Pick** evaluation questions and measures from a database.
- **Create** a plan to evaluate your initiative.
- **Find** useful resources and data collection tools.

Resources included in the Evaluation Guide

Evaluation Plan Template

Online Version

Evaluation Plan
(from the Compassionate Communities Evaluation Guide 2023)

The purpose of creating an Evaluation Plan is to help you and your team *define the best evaluation approach* to suit your initiative's needs. It brings together key information and allows you to narrow down the questions you'll want to ask, the best ways to answer them, and when you'll want to collect that data. By creating your evaluation online, your answers will be saved. This can be helpful if you accidentally close your web browser.

Do you wish to create your evaluation plan by hand, click here to access the document. Please place your email to **get a copy of this evaluation plan at the end**. You will receive an email copy of this plan, including a link (located at the top of the email) to adjust the content as needed.

ph4pc80@gmail.com Switch account

* Indicates required question

Email *

Your email

Next   Page 1 of 5   Clear form

Downloadable Fillable Version

Next, use the **evaluation database** to select the type of evaluation you want to conduct based on your initiative's Stage of Development, as well as the most relevant evaluation questions, measures and data collection tools to include in your Plan. Remember that these are only suggestions, feel free to adapt and add your own!

Stage of Development	Evaluation Type	Evaluation Question	Measurement Data to Collect	Data Collection Tool(s)	When Will We Collect Data

Project ECHO BY Pallium Canada
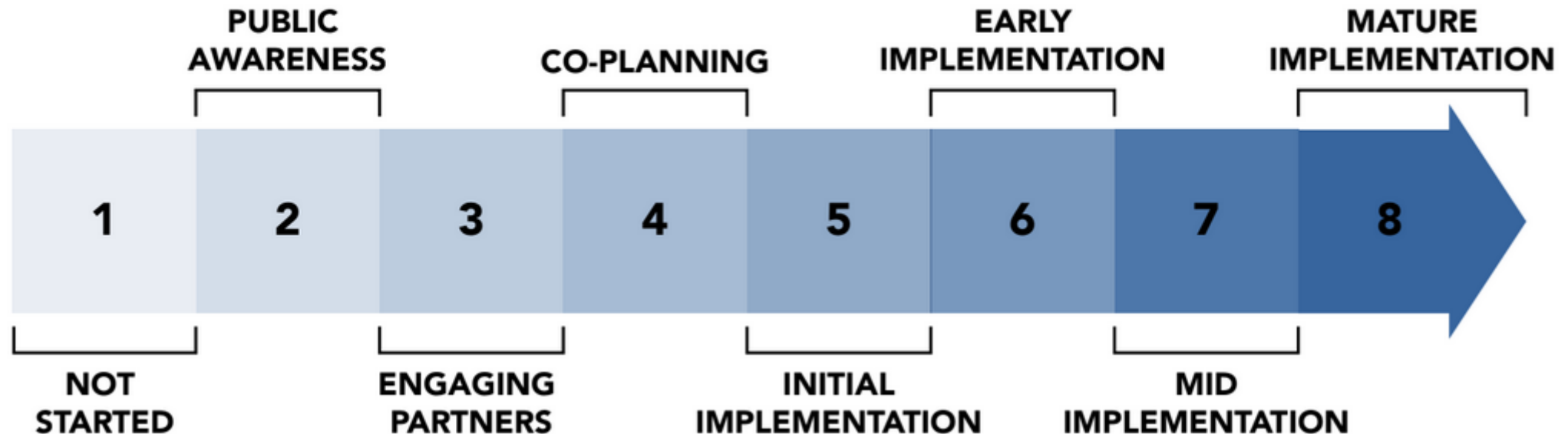Palliative Care · Canada

Evaluation Planning Checklist

Possible Steps[1]

- **Establish your evaluation team and partners.** We can't stress enough how important it is to determine who'll be involved throughout your evaluation process and to make sure they're on board. See **Tips for Creating an Evaluation Team.**

- **Map out the initiative you intend to evaluate** to ensure your team members and partners have the same understanding about your initiative. This is where you'll identify your focus, target population, proposed solution, resources, activities, and expected outcomes. See **How to Map Out Your Initiative**.

- **Create Your Evaluation Plan** using this guide to help you identify the most relevant evaluation questions, appropriate evaluation measures and data sources, and data collection tools.

- **Secure budget for the evaluation,** if needed.

- **Develop data collection plan and tools** such as guides or spreadsheets.

Stages of Development Identification Tool

CANADIAN COMPASSIONATE COMMUNITIES' STAGES OF DEVELOPMENT

PUBLIC AWARENESS

CO-PLANNING

EARLY IMPLEMENTATION

MATURE IMPLEMENTATION

1   2   3   4   5   6   7   8

NOT STARTED

ENGAGING PARTNERS

INITIAL IMPLEMENTATION

MID IMPLEMENTATION

Database of Evaluation Questions and Measures

Initiative Stage	Evaluation Type	Potential Evaluation Questions	What to Record, Track and Report	Suggested Data Collection Tool	When to Collect Data
1) Not Started	Needs Assessment	Who needs care in our community and what are those needs? What are some of the gaps that exist around these needs?	List of needs and gaps identified by community members and appropriate stakeholders	Environmental Scan (external documents, literature, websites), Survey	At the beginning of the initiative and every 3-5 years
		What are our goals for this initiative and how can we achieve them?	Perspectives from management and/or community members	Interviews, Focus Groups	At the beginning of the initiative and ongoing
		In what ways would we like people to benefit from our initiative? How will we know if we've succeeded?	List of short-, medium- and long-term outcomes (e.g., logic model), perspectives and rationale for anticipated benefits	Interviews, Focus Groups	At the beginning of the initiative
		What is the geographic reach of our initiative?	Formal or informal operational plan (geographic reach - e.g., city, county, provincial, national)	Environmental Scan (external documents, literature, websites), Survey	At the beginning of the initiative and ongoing
		What do we need in terms of human and financial resources? If we need more, how will we get them?	Formal or informal operational plan (HR and financial needs)	Environmental Scan (external documents, literature, websites), Interviews	At the beginning of the initiative
2) Public Awareness		How can we get the word out about our initiative? Who might benefit from hearing about our initiative?	Formal or informal marketing plan (ideally informed by community member needs and preferences)	Environmental Scan (external documents, literature, websites), Survey	At the beginning of the initiative and ongoing
3) Engaging Partners		Are there specific groups that could benefit from our initiative (e.g., Indigenous peoples, urban/rural populations)? How will we go about engaging/collaborating with them?	Number and demographic information of people that will be served by our initiative (e.g., target age, education level, cultural background)	Environmental Scan (external documents, literature, websites), Population Stats published by your province, city or county	At the beginning of the initiative and every 3-5 years
4) Co-Planning		Are there other organizations doing similar things? What would be different about our initiative?	List of other organizations and their services, list and describe the services to be offered through our initiative	Environmental Scan (external documents, literature, websites)	At the beginning of the initiative and every 3-5 years
		Are there other organizations, stakeholders or communities that we would benefit from engaging/consulting/partnering with?	List of organizations, stakeholders or communities that can assist us in achieving our goals, Partnership Agreements	Environmental Scan (external documents, literature, websites), Survey	At the beginning of the initiative and ongoing

Other resources to help you:

- Describe and refine your initiative
  e.g. Logic Model Template.

- Grow your evaluation knowledge
  e.g. case studies and published articles.

- Get started on your evaluation
  e.g. data collection tools.

Resources

Here's a list of resources to help you get started on your evaluation based on your initiative's current Stage of Development. We've also included other related resources that can help you as you develop and refine your Compassionate Community initiative.

Pro Tip: Refer to tools from other Stages of Development to inform your evaluation.

GENERAL EVALUATION RESOURCES

Criteria for Selection of High-Performing Indicators (Better Evaluation)
This article is a checklist designed to help you reflect on the indicators you are planning to use in your evaluation plan.

Evaluating Community Impact (Tamarack Institute)
The Evaluating Community Impact page offers helpful resources for community organizations looking to evaluate the impact of their initiatives.

Evaluating Community Programs and Initiatives: Chapters 36–39 (Community Toolbox)

Example: Logic Model Template

Program Name:

PROBLEM STATEMENT:
PROGRAM GOAL (S):

Resources
What resources do we have to work with?

Activities	Outputs	Short-term Outcomes	Intermediate Outcomes	Long-term Outcomes
What happens in our organization?	*What are the tangible products of our activities?*	*What changes do we expect to occur within the short term?*	*What changes do we want to see occur after that?*	*What changes do we hope to see over time?*
Activity Category				

How to get your free copy!

www.pallium.ca

(Compassionate communities Section)

www.bc-cpc.ca

(Compassionate communities Section)

Questions

Let's Engage With The Evaluation Guide

Case Study 1: Evaluation Plan for an Initiative in its early stage

Volunteer-led Advance Care Planning Sessions

Tips! Before you begin make sure that:

- ✓ Your have a team and they are on board.
- ✓ Use the Evaluation Planning Checklist.
- ✓ Start with a simple evaluation plan that your team can handle and learn from.

Now, let's follow the steps outlined

in the checklist tool

Possible Steps[1]

- **Establish your evaluation team and partners.** We can't stress enough how important it is to determine who'll be involved throughout your evaluation process and to make sure they're on board. See **Tips for Creating an Evaluation Team.**

- **Map out the initiative you intend to evaluate** to ensure your team members and partners have the same understanding about your initiative. This is where you'll identify your focus, target population, proposed solution, resources, activities, and expected outcomes. See **How to Map Out Your Initiative**.

- **Create Your Evaluation Plan** using this guide to help you identify the most relevant evaluation questions, appropriate evaluation measures and data sources, and data collection tools.

- **Secure budget for the evaluation,** if needed.

- **Develop data collection plan and tools** such as guides or spreadsheets.

Step 1: Describe the initiative (p2)

Initiative: Deliver Volunteer-led Advance Care Planning information sessions to enhance public awareness & engagement.

(Why) Goal: To empower people to advocate for care that is aligned with their wishes through advance care planning.

Where: City of Chilliwack (90,000 population and is located 100 kilometers east of Vancouver)

Step 1: Describe the initiative (p2)

Activities

- Analyze the problem.
- Identify the target population.
- Promote the idea of doing this type of activity using a credible model and low-cost resource that already exists.
- Explore community interest and confirm buy-in
- Reach out to potential partners/sponsors.

- Secure resources required to support the delivery of ACP information sessions:

    Volunteers interested in becoming ACP facilitators, support resources for the facilitators, a coordinator, advertising, logistical resources (venue, refreshment, handouts), sponsors/partners.

- Train volunteers
- Test the delivery of 2-3 volunteer-facilitated ACP sessions.
- Improve the delivery plan.
- Deliver the ACP sessions according to the determined schedule.

Optional Step

Volunteer-facilitated Advance Care Planning Sessions- LOGIC MODEL

Problem: Low public awareness & engagement in advance care planning.

Goal: Empower people to advocate for the care that is aligned with their wishes through advance care planning.

Required Resources: Partners/sponsors, Coordinator, Volunteers, Access to credible, low-cost training and coaching program, marketing, venue, refreshments, handouts for public participants.

Who We Will Reach: Target population, ACP master trainers, and potential partners, sponsors, and volunteers.

ACTIVITIES	OUTPUTS	OUTCOMES
☐ Analyze the problem. ☐ Identify the target population. ☐ Promote the idea of doing this type of activity using a credible model and low-cost resource that already exists. ☐ Explore community interest and confirm buy-in ☐ Reach out to potential partners/sponsors. ☐ Secure required resources. ☐ Train volunteers ☐ Test the delivery of 2-3 volunteer-facilitated ACP sessions. ☐ Improve the delivery plan. ☐ Deliver the ACP sessions according to the determined schedule.	☐ Summary report describing the problem, needs, interest, and potential assets. ☐ List of volunteer facilitators recruited. ☐ List of trained facilitators ☐ A toolkit for trained facilitators ☐ Advertising materials ☐ List of confirmed partners and sponsors ☐ Results of session testing ☐ Number of ACP public sessions hosted. ☐ Number of sessions hosted.	**Volunteer- facilitators:** ☐ Increase in ACP knowledge. ☐ Increase in level of skills and confidence to facilitate ACP sessions. **Public participants:** ☐ Increase in ACP awareness. ☐ Enhanced knowledge of ACP. ☐ Increase in readiness & confidence to start or complete.

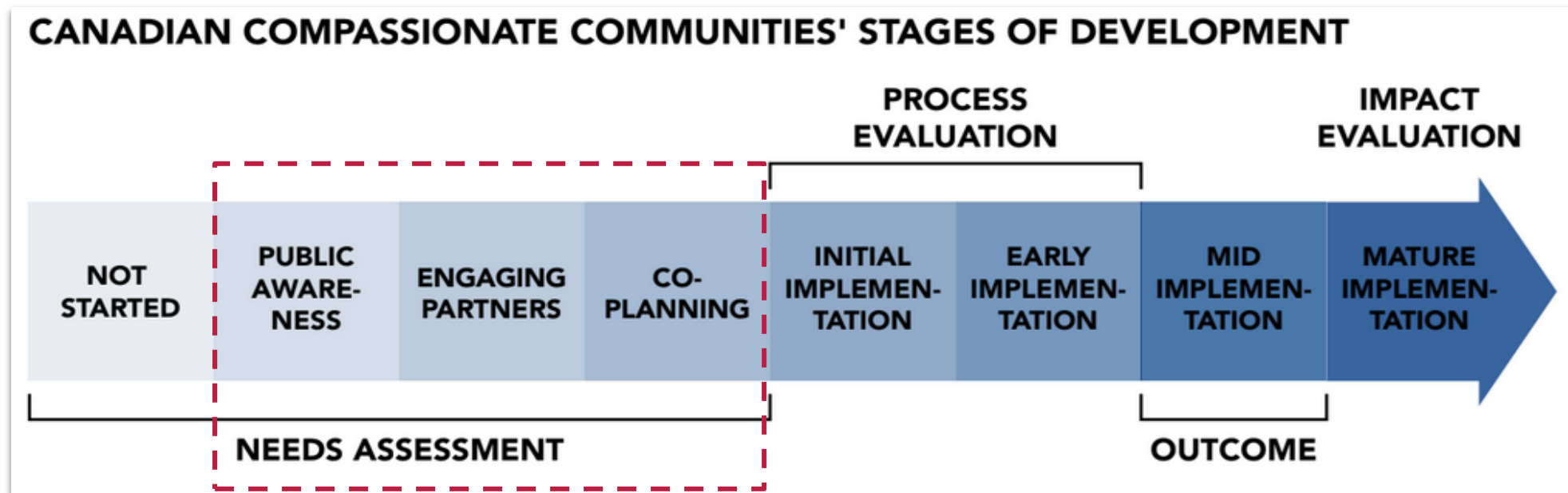# Step 2: Identify the current stage of development

Initiative: Volunteer-led Advance Care Planning in the community

CANADIAN COMPASSIONATE COMMUNITIES' STAGES OF DEVELOPMENT
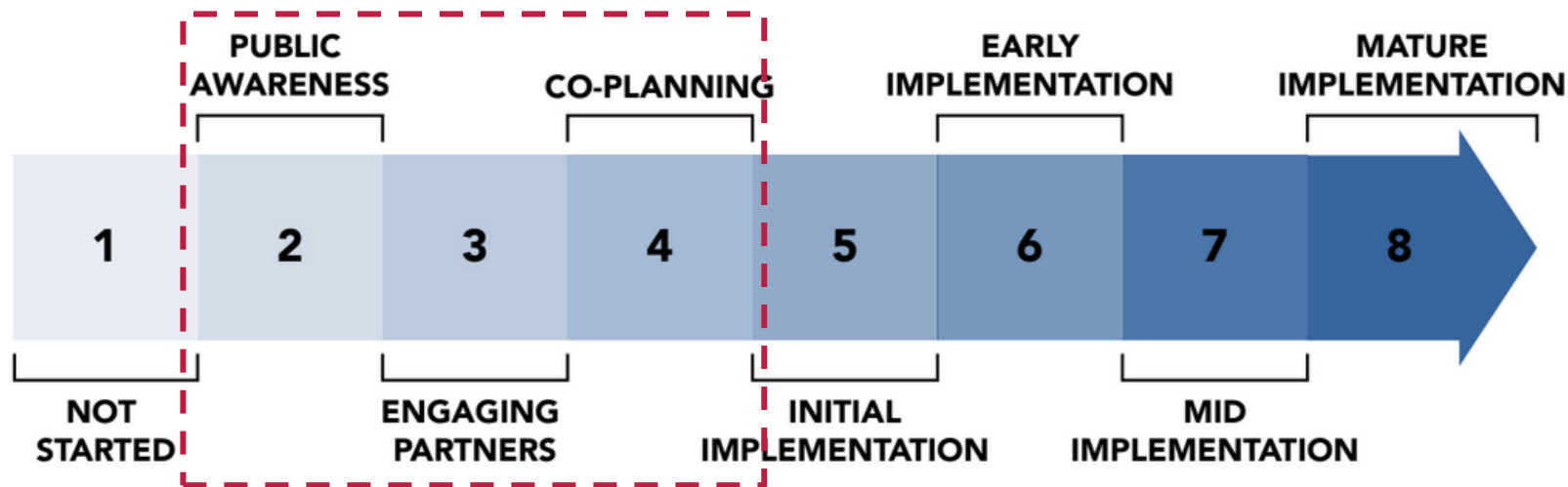
Step 3: Identify the evaluation type(s) recommended for initiative's stage

Needs Assessment: (including assessment of community needs, level of readiness and interest, existing asset that could be used)

CANADIAN COMPASSIONATE COMMUNITIES' STAGES OF DEVELOPMENT

	PROCESS EVALUATION			IMPACT EVALUATION
NOT STARTED	PUBLIC AWARE-NESS	ENGAGING PARTNERS	CO-PLANNING	INITIAL IMPLEMEN-TATION	EARLY IMPLEMEN-TATION	MID IMPLEMEN-TATION	MATURE IMPLEMEN-TATION

NEEDS ASSESSMENT

OUTCOME

Step 4: Select Evaluation Questions

Needs Assessment: Potential questions:

Tip - try to pick questions that target a variety of audiences

ex. community, own team, partners/sponsors, target population

1. What is the **geographic reach** of our initiative?
2. In what way would we like **people** to benefit from this initiative?
3. What **population groups** would benefit the most from this initiative?
4. How many **people** in our community have an advance care plan?
5. Are **people** aware of the benefits of ACP?
6. Are **people** interested to learn about ACP?
7. Are **community partners** interested to support/sponsor this initiative?
8. Are **volunteers** interested in delivering ACP information sessions?
9. What are training needs for the interested **volunteers**?
10. What ACP training opportunities exist for the interested **volunteers**?
11. What **other resources needed** to support the delivery of ACP sessions.

Tool to use:

Evaluation Database

Step 5: Identify measures and data sources

Evaluation Question	What to Track (Measure)	Possible Data Sources
1. In what way would **the community** like its members to benefit from this initiative?	List of the expected benefits from this initiative	Community Forum
2. What **population groups** would benefit the most from this initiative?	List of population groups who would benefit the most from ACP e.g. older adults, people with life-limiting illness	Focus group (Public) Key informant consultation
3. How many **people** in our community have an advance care plan?	% of people who have an ACP completed	Public survey Community forum
4. Are **people** aware of the benefits of ACP?	% of people aware of ACP and its benefits.	Public survey Community forum
5. Are **people** interested to learn about ACP?	% of people interested to learn about ACP.	Public survey Community forum

Step 5: Identify measures and data sources

Evaluation Question	What to Measure and Track	Possible Data sources
6. Are **community partners** interested to support or sponsor this initiative?	List of confirmed and potential partners and sponsors.	Community Forum Community outreach
7. Are **volunteers** interested in delivering ACP information sessions?	List of interested volunteers	Community Forum Community outreach
8. What are training needs for the interested **volunteers**?	List of knowledge areas, skills and tools, coaching needed to equip volunteers to become ACP facilitators.	Key informant consultation Published research
9. What ACP training opportunities exist for the interested **volunteers**?	% of people aware of ACP and its benefits.	Environmental scan Key informant consultation
10. What **other resources needed** to support the delivery of ACP sessions.	List of all needed resources for delivering the session	Key informant consultation

Step 6: Explore the "Resources" section

Tools for common data collection methods

INITIATIVE STAGES 1–4 — NEEDS ASSESSMENT

Not Started

Compassionate Community Index (BC Centre for Palliative Care)

The Compassionate Community Index Tool will help you to assess your community's readiness to help those in need of grief, illness and caregiving supports.

Death Literacy Index (The Groundswell Project)

The Death Literacy Index is a way of measuring and understanding what contributes to people's level of death literacy. It provides a population-based measure of death literacy to determine current levels of death literacy at a whole of population, workforce and local level and measure the impact of local and wide-scale initiatives.

Environmental Scan and Logic Model (Johnson Shoyama Graduate School of Public Policy)

The Environmental Scan tool will help you analyze what environmental factors are affecting your organization's success so that you can tailor your goals for the future.

Mapping our Ecosystem (Tamarack Institute)

This tool will help you create a visual of the landscape of your initiative, and can highlight gaps, assets, potential stakeholders and more.

Conducting Focus Groups (University of Minnesota)

The Designing and Conducting Focus Group Interviews tool will help you design and conduct focus group interviews.

Conducting Surveys (Community Toolbox)

The Conducting Surveys tool will inform you on how to survey your target population in order to obtain data through a list of questions.

Hosting a Citizen's Jury (Tamarack Institute)

The Hosting a Citizen Jury tool will help you acquire opinions from not only experts but also everyday individuals, service providers, target groups and those who are making decisions.

Strategies for Qualitative Interviews (Harvard University)

The Interview Guide Tool will explain step-by-step how to conduct an interview.

Step 7: Populate Evaluation Plan Template...

....with information gathered from previous steps (1-6)

Next, use the evaluation database to select the type of evaluation you want to conduct based on your initiative's Stage of Development, as well as the most relevant evaluation questions, measures and data collection tools to include in your Plan. Remember that these are only suggestions, feel free to adapt and add your own!

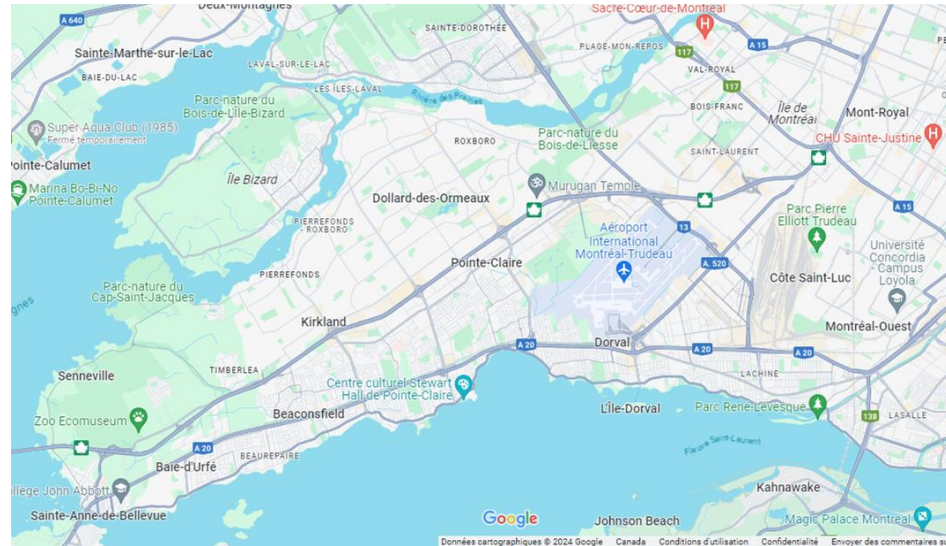| Stage of Development	Evaluation Type	Evaluation Question	Measurement Data to Collect	Data Collection Tool(s)	When Will We Collect Data

Questions

Case Study 2: Initiative-wide Evaluation

Montréal's West Island Compassionate Community

Case Study 2: Initiative-wide Evaluation
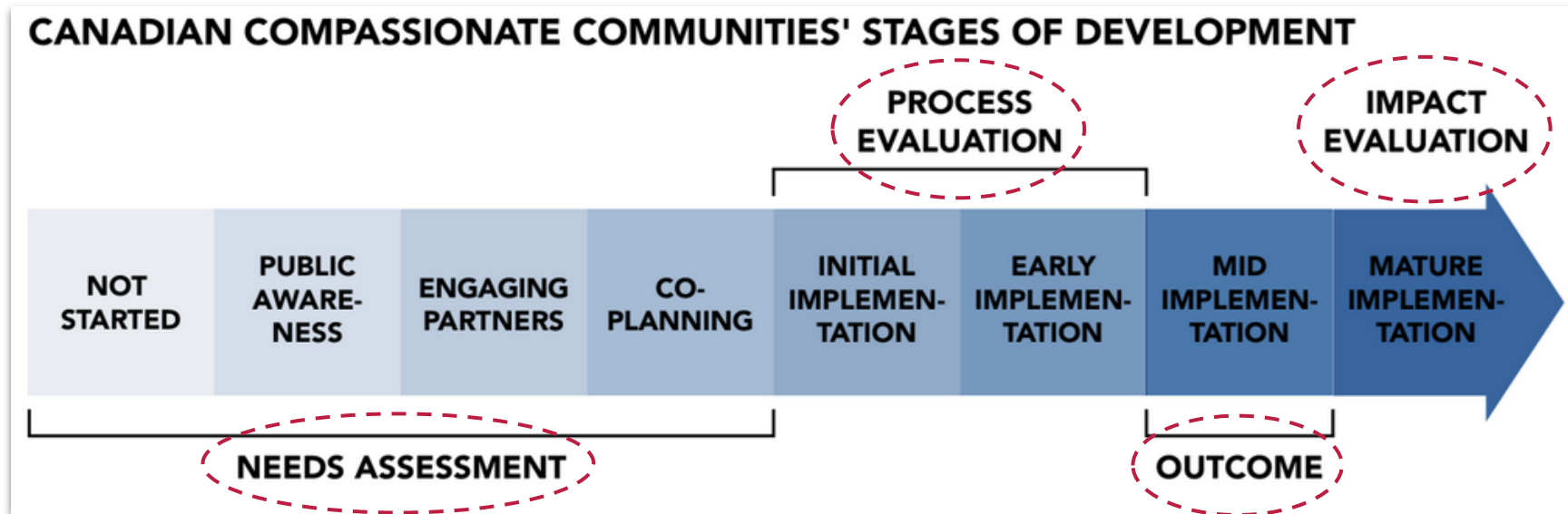
Montréal's West Island Compassionate Community

Who: Compassionate Community initiative - Participatory Action Research (2018-2023)

Where: West Island territory, Montréal - Suburbs with a population of 400,000

Goal: Engaging community members and citizens to develop a community response for people coping with significant loss, end of life and bereavement

How: By developing an initiative-wide evaluation plan to assess community engagement and resulting implemented activities

Example 2: Needs Assessment - Stage 2 to 4

Stage	Target groups	Evaluation Question	Data collection/source
2	Community partners and organizations	Are there other organizations doing similar things? What would be different about our initiative?	Environmental Scan: List of other organizations and their services (asset mapping), list and description of the services to be offered through our initiative or list of potential community partners for co-design At the outset of the initiative and every 3-5 years
3	Community, citizens and general public	How will we get the word out about our initiative?	"Marketing" plan (internet, social media, websites): Google Analytics At the outset of the initiative and ongoing
4	Target population (caregivers, serious illness, etc.) and community organizations	In what ways do we think people will benefit from our initiative?	Perspectives from community organizations and those concerned, and rationale for anticipated benefits (asset mapping, needs assessment and proposed CC project) Ongoing evaluation (from stage 4 to 8)

Exemple 2: Process evaluation

Process evaluation (implementation) - Stage 5-6

Stage	Target groups	Evaluation Question	Data collection/Frequency
5	Intern and community partners	Were all initiative activities delivered as planned?	Documentation: List of completed activities against those planned Within the first 6-12 months
6	Intern, community partners and your target population	Is there anything about the design or delivery of this initiative that worked particularly well or could be improved?	Interviews, Survey, Focus Group: Perspectives on design and delivery of the initiative by staff/volunteers, management and community members Within the first 6-12 months and every 3-5 years

Exemple 2: Outcome evaluation

Outcome evaluation - Stage 7

Stage	Target groups	Evaluation Question	Data collection/Frequency
7	Organization (intern), community partners and target populations	What are the key outcomes your initiative is trying to achieve? To what extent have the short-term outcomes been achieved?	Documentation: List of outcomes to be achieved (see stage 4) Progress against identified outcomes (e.g., increased access to services, participation rates against target, satisfaction) Interviews, Survey, Focus Group Within 12-18 months and every 3-5 years

Example 2: Impact evaluation

Impact evaluation - Stage 8

Stage	Target groups	Evaluation Question	Data collection/Frequency
8	Community and target populations	What is the impact on the community you are serving?	Survey, questionnaire and/or interviews Perception of stakeholders, community organizations and target populations on the initiative's contribution and impact

Every 3 to 5 years |

Tips: select indicator(s) and measure(s) according to your target population (seniors, caregivers, bereaved) and issues being addressed by your ComCom (e.g. Death Literacy Index, loneliness scale, social support, empowerment, etc.).

Questions

You Have an Evaluation Plan…Now what?

Evaluation Phases

Evaluation Phase	Possible Steps[1]
Do	• **Collect evaluation data** using existing sources or the tools you developed earlier, such as: • surveys (consider using free survey applications that provide simple analytic reports, such as Survey Monkey) • website and social media analytics • interviews • focus groups • review of internal documents (e.g., project documentation) • review of available literature (e.g., research papers, websites)
Study	• **Analyze and summarize evaluation data:** • Quantitative (#,%) - think statistics • Qualitative (verbal or written answers, summarized by themes to tell a story and bring more feeling into the results). • **Get feedback on the evaluation results** from your team and partners. • **Draft evaluation report.**
Act	• **Share report and evaluation results** with the community, stakeholders and potential funders. • **Develop an action plan for making use of evaluation findings.** • **Implement changes in your initiative accordingly.**
Revisit	• **Make adjustments to your Evaluation Plan** based on the changes made to your initiative and the lessons learned such as what should we do or measure differently next time?

Appendix 2: Evaluation Steps

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Need Further Information & Guidance?

We suggest that you:

- Review the **Resources Section** in the Guide.
- Reach out to the organization in your province that provides support to compassionate communities e.g. BC Centre for Palliative Care in British Columbia, Covenant Health in Alberta, HPCO in Ontario.
- Reach out to Pallium Canada.
- Consult a peer organization/group.
- Hire an evaluation consultant.
- Reach out to academic program: support from a student trainee

Acknowledgements:

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Session Wrap Up

- Please fill out our feedback survey, a link has been added into the chat.

- A recording of this session will be emailed to registrants within the next week.

- Thank you for your participation!

Thank You 👋

![Project ECHO - Palliative Care - Canada - BY Pallium Canada]