MICHIGAN HEALTH ENDOWMENT FUND

EVALUATION APPROACH: HOW TO GUIDE

Evaluation is a powerful tool: it helps us measure our effectiveness, understand our impact, and inform decision-making. At the Health Fund, we strive for tangible and lasting health improvements for Michigan residents, and we know that our success is linked to our grant partners' success. To that end, we integrate evaluative thinking into all of our work at the Health Fund, collaborating closely with our grantees to measure success and build evaluation capacity.

Evaluation is a priority across the Health Fund's grant portfolios, but we do not require formal evaluation plans from grantees or applicants. We do however recommend that applicants outline their proposed evaluation approach. Based on our experience, our most successful grantees are able to clearly articulate the anticipated relationship between project activities, outputs, short- and long-term outcomes, and the overall impact(s) they're aiming to achieve.

This document aims to help you construct your project's evaluation approach. It walks you through the basics of how to develop a reasonable plan for your project's evaluation, including: what will be done, how it will be done, when it will be done, who will do it, the purpose of the evaluation, and how you (and others) will use the findings. Given that the evaluation planning process is cyclical, not linear, we want to be clear that we know your evaluation approach may change over time and will most likely be revised as your project or program evolves.

FORMAT AND SUBMISSION

The format of your evaluation approach document is up to you! But, pictures always help! That said, we suggest using both a visual depiction and a narrative explaining your approach. Please note that regardless of the format you choose, the evaluation approach should not exceed three pages, and it should address each of the **key terms** highlighted below.

Logic models and theories of change are two of the most common approaches for visually depicting an evaluation plan. A logic model is a systematic, visual representation of the basic relationships between the inputs, activities, outputs, outcomes, and impacts of your program. It describes the relationship between what you plan to do and the changes or results you hope to achieve. A theory of change depicts the causal pathway of change that links strategies to outcomes to explain how and why a desired change is expected to come about. Theories of change are best when they start with a larger goal in mind and can be used before deciding specific programmatic approaches. If neither of these tools seem ideal, you could also create a strategy map, diagram, or even a table to depict your approach.

We've shared a few examples in the pages that follow, but choose what works best for you—these examples are merely provided as guidance. The narrative could include a list of stakeholders, your evaluation questions, methods and data collection strategies, your plan for data analysis, and how you'll plan to use and disseminate your findings.

Upload your project evaluation as a separate document in the "Attachments" section in Fluxx. This evaluation approach is a separate document from the work plan (also required), but they should complement one another.
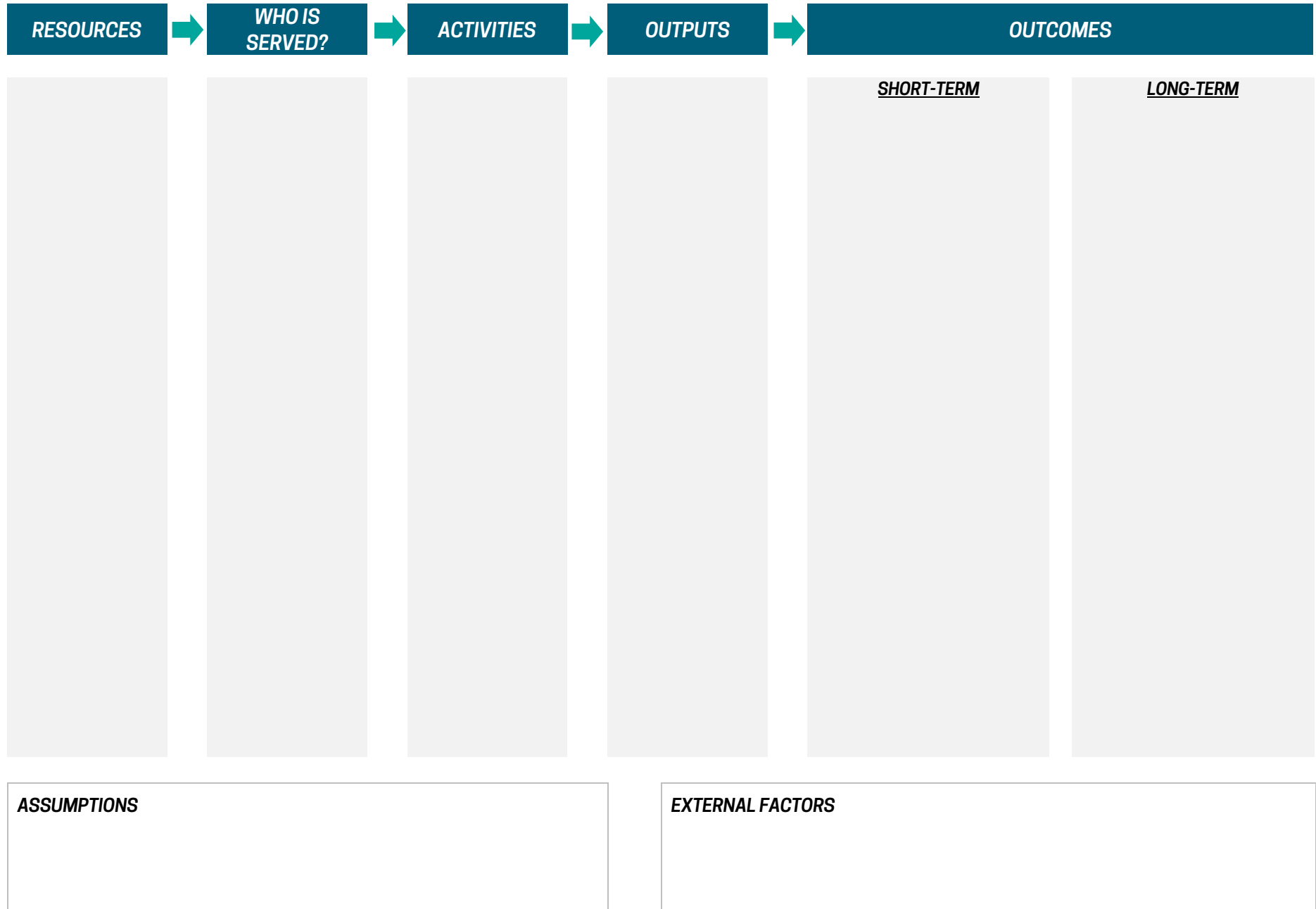
KEY TERMS TO INCLUDE

1. **Stakeholders** are the people and groups involved in your project. They can be implementers involved in making a program happen, supporters working as your partners, participants or beneficiaries that are served by your work, and decision-makers that are in a position to do or decide something about your work. Briefly identify the stakeholders in your project and what they might want to learn from your evaluation.

2. **Inputs** are the resources your organization devotes to a project or program, whether they be human, financial, capital, organizational, or community resources. Expertise—such as a consultant or the input of a partner organization—can be also considered an input.

3. **Activities** are the work! They are the specific things you propose to do as part of your project or program. Activities should ideally produce movement toward outcomes. They might include trainings, outreach to create a partnership, curricula development, or direct health services.

4. **Outputs** are the direct, tangible results that tell the story of what you produced via your activities. They are evidence that a program's activities were performed as planned and/or whether it is reaching the number of people anticipated. Outputs might be training classes offered, or the total number of people served by an activity. However, output measures do not address the value or impact of a project's activities.

5. **Outcomes** are specific improvements that occur as a result of your organization's work. Outcomes occur over time, ranging from short-term to long-term. For example, a short-term outcome might be increased provider knowledge of clinical guidelines, whereas a related longer-term outcome might be that a health system implements new clinical guidelines. An outcome is not the publication of a report or outreach to a certain number of people. Long-term outcomes typically involve behavior change, policy change, systems and environmental change, and health outcomes.

6. **Impact** is the ultimate goal (or goals) that your organization hopes to achieve. This could be during and/or beyond the grant period.

REFERENCES AND RESOURCES

There are many, many resources that can provide more guidance on how to build your evaluation approach. Here are a few we recommend:

- CDC Approach to Evaluation
- W.K. Kellogg Foundation Step-by-Step Guide to Evaluation and Logic Model Development Guide
- "Tearless" Logic Model Process Guide
- University of Minnesota Children, Youth, and Families Evaluation Tools

EVALUATION APPROACH: SAMPLE LOGIC MODEL

RESESOURCES	→	WHO IS SERVED?	→	ACTIVITIES	→	OUTPUTS	→	OUTCOMES	
								SHORT-TERM	LONG-TERM

ASSUMPTIONS

EXTERNAL FACTORS

EVALUATION APPROACH: SAMPLE TABLE LOGIC MODEL

INTENDED IMPACT(S):					
INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	MEDIUM-TERM OUTCOMES	LONG-TERM OUTCOMES

EVALUATION APPROACH: SAMPLE THEORY OF CHANGE

What is the problem you're trying to solve?	Who are your audiences or stakeholders?	How will you reach your audiences or stakeholders?	What steps are needed to bring about change?	What will be the measurable effect(s) of this work?	What are the wider benefits of your work?	What is the long-term change you're intending to achieve?

EVALUATION APPROACH: SAMPLE LOGIC MODEL

INPUTS	OUTPUTS		OUTCOMES		
	Activities	Participation	Short-term	Medium-term	Long-term

ASSUMPTIONS

STAKEHOLDERS