Leading Public Health: Data-Driven Leadership

Episode 4: Designing the Evaluation

Liz Kidwell (LK): Welcome to Leading Public Health, a podcast from the Region IV Public Health Training Center at Emory University. Through this podcast, we explore current leadership challenges, strategies, and ideas to help build the capacity of the current and future public health workforce. In this series, Data-Driven Leadership, we explore the essential role leaders play in incorporating fairness into program evaluations. You'll gain valuable insights from experts who share practical tools and strategies for measuring and enhancing program impact. This series features pre-recorded sessions from a Project ECHO initiative offered by the Region IV Public Health Training Center, the Injury Prevention Research Center at Emory, and Safe States Alliance.

Today, we're diving into the heart of the evaluation process—framing the right questions and designing the evaluation itself. In order to assess the impact of your public health initiative, you need to define what you're trying to measure and how you'll go about collecting and analyzing the necessary data.

To guide us through this topic, we will hear from Dr. Tara Dixon. She'll take us through the essential steps in creating a strong evaluation framework, including the importance of framing the right questions, deciding on data sources, and working collaboratively with those most impacted by your program. All resources shared in the episode will be linked in the show notes, so be sure to check that out after you listen.

Let's get started and explore how thoughtful evaluation design leads to actionable insights!

Kady Pecorella (KP): Our subject matter expert and presenter today is Doctor Tara Dixon, who is an experienced healthcare leader, evaluator, and researcher. In 2009, Dr. Dixon founded the Research and Evaluation Group or Eval Group as a full-service research and evaluation firm specializing in providing professional services in public health and healthcare. She's an expert in public behavioral and community health research and evaluation and has also evaluated multi psych, chronic disease and substance abuse prevention projects domestically and internationally. So, thank you for joining us today. And Tara, I will hand it off to you to get started on the presentation.

Tara Dixon (TD): Good morning, everyone, there's three main learning objectives throughout this session. The first one is developing health equity evaluation questions. And I know this is sometimes a challenging part of designing evaluation. We'll also talk about some of the common challenges that evaluators have while designing health equity evaluations. And then we'll follow that up on how do we continue to build and

integrate equity into future evaluation designs as we continue to evaluate different programs and processes across our organization.

So as I said, we'll start with developing an equity evaluation questions. So just as an overview, you probably went over this in the last three sessions, but I want to make sure everyone has a good understanding of the difference between a general evaluation versus a health, a health equity evaluation. And typically, a general evaluation focuses on the overall effectiveness and efficiency of the program. However, a health equity evaluation really specifies and is really concerned about the disparities, whether it's in access, disparities in access to treatment, or outcomes for different populations that you're serving. So really focusing on those disparities and understanding where those disparities lie is a focus when developing and designing health equity evaluations. We frame our evaluation questions to ensure that they're investigative. We want to be able to answer programs impact if possible, but also understanding how are we reducing disparities. And so your questions should be framed around that framework when thinking about designing an evaluation question.

So I want to talk a little bit about some good criteria before we go into examples of questions. And this is pulled directly from Wingate's book titled "Evaluation Questions Checklist for Program Evaluation." This will be provided to you later on in your resources. So you can go back to this as you are designing your own evaluation and ensure that you're meeting these 5 criteria. And I'll go through these before we go through our questions. So the first one is, is it evaluative? So when you're designing your question, you really want to understand is the question framed so that it actually yields an answer? Can we evaluate this question? Can the question provide merit or worth or significance and does it directly inform the decisions, decisions about the program? The second one is, is it pertinent? Just understanding is it relevant to the program's design or the purpose or activities that are taking place of the program. And so ensuring that your question is designed with purpose and that what evaluation users need to find out from the evaluation. So is it useful if we answer this question. Thinking about the third one, is it reasonable? Obviously, we need to make sure that it's within the scope of the program. I think a lot of times as evaluators as we come in to evaluate a program, we think of, we think of evaluation questions that may be useful, but it may not be within the scope of the program. So, ensuring that your question as you're designing it and framing it, is within the the program's scope. And then also thinking about resources, is it even monetary or non monetary resources and how that's reasonable within your question that has to be answered. The question should also be specific to the program components and ensuring that you understand how that question affects the components of the program. So keeping it very specific and not too broad so that it can actually be answered. And so the final one, which I think is actually the most important one, is ensuring that your question is answerable. So you can ask a lot of questions, but can you actually answer that question and make sure that you take into consideration either the privacy, the ethics, politics, geographic location or any other potential issues that may hinder the the question from being answered. And we'll talk a little bit more about this as we talk about the different types of questions that we can design and the different components within this. But this is a really good resource to go

back to as you're designing your own questions, especially if it's focused on a health equity evaluation, you want to ensure that you meet these five criteria if at all possible.

So, as I said, we'll talk about different types of evaluation questions. The 1st group of questions if you truly want to design a health equity evaluation, your questions should be focused and understand the culture and have some type of culture awareness within the question. So 2 that I have listed as suggestions or examples of questions that focus on culture are, "are the program material and services culturally aware or accessible to different racial and ethnic groups?" And then the second one is "how well does the program provide language translation and interpretation services to meet the needs of non-English speaking participants?" And if you understand, I'm sure in your other 3 sessions, you understand how the importance of involving the community in that is important in your evaluation is important. And so ensuring that you understand the culture and you are aware of the culture that you are implementing your program in is very important. So going through these questions and speaking to the community and understanding the accessibility that needs to happen for your program and if you can answer this question as well. The second one is program, just your overall program and how you can focus on evaluating the program. And so, we want to be aware of the barriers to accessing the program and have they been identified for underserved groups. Typically, in a general evaluation, you identify barriers, you ask the question what barriers are there. But with a health equity focus, you want to focus on the underserved group and ensuring that there's no difference or if there is and if there is a barrier that you're identifying that and being able to report that out within your evaluation. And then if there are, if you have addressed the barriers, how effective has that been addressed? And so even though you may know the barriers, how is it affecting that underserved group? And is it effectively addressed? Looking at social determinants of health, 2 examples I have provided is one of them is to what extent has the program addressed social determinants of health that contribute to health inequalities? So considering housing, education and income or any other determinants of health, those are things that you really should be asking and that should be included in your evaluation question when you're designing it and ensuring that you're focusing on some type of social determinant of health. And the second one is, has the program involved access to resources? So can the program participants access the resources that are being provided? Do they have transportation? Are healthy foods available? Do they have employment? and what impact does that have on the health of the underserved population? So, if you're providing a service, if your program is providing a service, do they even have transportation to access those resources? So thinking through those as well to ensure that those barriers are removed or understanding what those barriers are so those can be addressed within the evaluation.

And then desegregating, disaggregating data is really important. This is not part of the, this is the design, but not the analysis. But when you're designing your evaluation, it's really important to have the end in mind. And so, what are we going to do with the data and ensuring that the data is being analyzed properly and and correctly. You need to have questions that understand how the program collected the data as well as how it will be reported. And so when you're focusing on a health equity evaluation, you want to ensure that the the data is separated out by race or ethnicity, gender or social economic status in order to track the progress towards reducing those disparities. And

if you recall, as I said earlier, the focus of a health equity evaluation is to reduce disparities or find those disparities and how are you reducing those. And so ensuring that you have a question that really understand, that can answer how the program is collecting and reporting data based on reducing those disparities as well as what do the data show about differences in program participation. And this is also separating out that data. Is there a difference between service delivery for different populations? Is there a difference between participation as well as what is the overall outcome across different demographics? So really honing in on that data, separating it out and understanding the differences is really important.

So overcoming some common challenges. Evaluations can be challenging in and of themselves, but when you add another layer of ensuring that it has an equity focus, you can you can definitely find some additional challenges. So, let's talk about them and and discuss some possibilities on overcoming those. The first one is defining and measuring health equity and just understanding that health equity may mean something different to every community that you're serving. And so, ensuring that you have a clear definition of health equity before you're trying to design the evaluation. So, collaborating with the community is a really important piece here because when you're trying to design that definition, ensuring that the community that you're serving has a input in that definition so that you can lead with that definition as you're designing each component of your question, as you're designing your analysis, as you're designing your, as you're writing and reporting out the information. And use mixed method approaches. And this is a way to ensure that as much information is being captured as possible, qualitative and quantitative data and gathering data from all potential data sources as possible. And we'll talk a little bit more about that. Cultural awareness and responsiveness, understanding that the community needs to be involved from the very start. It's easier to start with who needs to be involved instead of trying to add the community in or the the correct participants in throughout the evaluation. So, if you have a clear definition and you've allowed the community to be part of that, you don't have to go back and make so many changes to ensure that your design is help is set up as a health equity evaluation. Build trust and and partnerships that go that coincides with that community involvement. If you at least have one touch point within the community, allow the community workers or those that already you've already built trust with or already have partnerships to go out and, and kind of be an advocate for you to support and strengthen the evaluation because the community most likely will trust someone within their own community. So, using those partnerships and growing and building those is a is a great way to kind of overcome some of those challenges that come with ensuring that you as the evaluator are culturally aware. And understanding cultural norms. If it's not your culture, you don't always know all of the norms. So once again, ensuring that you have someone from the community or multiple people from the community that are participating in the evaluation. Ensuring that your team is ultimately also culturally aware and provide trainings if possible and, and as needed, and ensuring that they're hearing the voice of your community that you're serving.

Some other common challenges, limited resources and time. I feel like a lot of evaluations that I've done personally, there's so much that I want to evaluate, but realizing that time is limited as well as resources. So, some of the ways that I found to combat those challenges is to prioritize the key evaluation components. As I said,

there's so many things I usually want to evaluate when I'm evaluating a program, but knowing how to prioritize those components has helped with ensuring that what needs to be evaluated is and so that we can have a very solid report at the end as well as really good data. And then sometimes it's, it's costly to collect your own data, primary data collection. So, look for ways to leverage existing data and get data from other resources, as well as streamlining your data collection process. And one way that I found that's really helpful with that is using a phase or iterative approach, so implementing small scale quick assessment. So what data do I have right now so that I can report on it on a weekly or monthly or however long your evaluation is component, instead of waiting till the end to gather all of that data, to analyze all that data and report out on it, you can develop small quick assessments and reports from the data that you do currently have, even if it's a small data set. And that information is valuable as well. So, this is a great way that I found that's really useful when I have limited resources and time with evaluations.

Another one is addressing structural and systematic barriers. This is a challenging one depending on what type of barriers you are dealing with when trying to design and implement a health equity evaluation. But some ways that I've found to be useful is using a system thinking approach. So holistically thinking about how to approach the evaluation and not in a linear approach. And that has really helped with kind of overcoming or alleviating those barriers, not always overcoming, but kind of breaking down some of those barriers. Collaborate with policy makers if at all possible. This isn't always a possible depending on the program that is being implemented. If there's an interest in some type of policy, some type of policy could come out of the evaluation. So it's really is dependent on the interests of the policy makers. But if at all possible, finding that collaboration has been very helpful to kind of breakdown some of those barriers that we've encountered in the past. You're going to see this a lot, but engage with the community. The community is so important when dealing with most of these challenges. That typically helps with overcoming challenges. If your community is engaged and there's buy in and they really truly believe in the program and they understand the importance of the evaluation and how it will provide positive outcomes for them in the long run. So ensuring that your community is engaged and understands the importance. And then focus on sustainability long term change. So, it's kind of like when you you're, you have limited resources, you're taking those really small steps. So, you know, in the end, there's going to be some type of long change, but focus on the small wins as you as much as you can, because structural and systematic barriers is a huge, it's, it's like the elephant in the room for me sometimes. Like it's just something that I, I, I have to chip away at very slowly when trying to overcome that. So just look at the long term and celebrate those small wins and, and, and that's one of the ways I found to be helpful with that challenge.

As I said, we'll talk a little bit about data. You will have a whole session on data and reporting out. But I did want to touch on this because when you're designing your evaluation, you really need to think about how it affects the data as well as the reporting. And so, thinking about how biases may be included in your data collection process or your interpretation or reporting process is a key to overcoming those challenges. So once again, including the community not only in the design, but also in the data collection process and in the reporting and interpretation of what the data is

saying. Design culturally aware data collection tools. And I know that's kind of like a common phrase, but what does that really mean? And ensuring that if your community is part of it, you have an open communication, you're collaborating and co-designing, then you're ensuring that the data collection tools are relevant and appropriate and are culturally aware for your community that you're serving. And then dealing with small sample sizes, consider pooling your data over multiple years or across similar geographic areas. And this is for the data analysts in the room. If you are analyzing your own data, there's some options here because a lot of times with especially community focused evaluations, your sample sizes may be fairly small, but that information is still valuable. And so how can you use that information to ensure that the information is still shared with the community as well as the policy makers if necessary?

So, supplementing with qualitative methods, like I said, mixed method, mixed method approach is typically the way to go when designing a health equity evaluation and then making sure the data is weighted if at all possible when you're dealing with small sample sizes. And then separating out that data. I mentioned this before, use multiple data sets if you can. Pull from national surveys, administrative data, wherever you can gather data to kind of compare or understand when you're pulling the data across different geographic areas. That's a way that you can overcome some of the challenges with your data set. And collaborating with external partners so that you can gain access to those data sets, if you don't have it. A lot of times if you are able to work with other community members or other organizations, you can have a data sharing agreement and you can use some of that data in order to use within your evaluation. Attributing causality is a hard one too, unless you have a good amount of resources and time. If you are, then you are able to design a rigorous study design that is that typically takes a lot of resources and a lot of time, and most of us don't always have that. So, there's different techniques and ways to attribute causality to your evaluation, but it doesn't, it's not always relevant. And then translate findings into action. I think this is an important piece when evaluating when you're designing your evaluation and especially designing your evaluation questions. If you can answer the question and then provide the findings from that, then writing your recommendations and your findings so that it's an action. And a lot of times within our organization, we try to use a lot of verbs because they're actionable within our recommendation. And so we tailor our recommendations to the audience, but we also write it in a way that we ensure that we're providing potential actions that can go beyond just the recommendation so that change can actually take place within that.

So, to kind of summarize the design of an evaluation and the questions behind when designing the questions of the evaluation is to start with the end in mind. And so taking looking at your evaluation design, 2 questions that I like to have my staff and my organization ask as we're designing it is "how does this evaluation add value to the population we are serving?" And if we can't answer that or we don't like the answer, then we need to really address how we're designing our evaluation. And then the second question is very introspective. And so we want to ensure "what is our intent of the evaluation and why are we evaluating this?" And so, ensuring that we can answer these questions truthfully and that it's a positive for the community that we're serving.

So these are two questions that we like to ask sometimes throughout the entire evaluation, but definitely when we're designing it, we ask these 2 questions as we're designing it and then at the end of the design.

The last part is develop a plan to integrate equity into future evaluation designs. So, if it's your first evaluation or you know, your 20th evaluation, ensuring that it has an equity focus. And sometimes we want to make sure that we're not losing the focus I guess or we're not losing the, the ensuring that we can continue to evaluate and still include a health equity design in it and not doing just a general evaluation. And so some ways that we found to be helpful with ensuring that we can continue future evaluation designs with a health equity focus is to build knowledge of equity concepts. That's what you're doing here. You're going through these sessions and ensuring that you understand health equity and how to approach that and how to design it and implement it within your evaluations, but building capacity for equity focused evaluations. And when I, when we think of this, we think of how are other evaluators doing that and collaborating with other evaluators that really believe in a health equity focus. And just reaching out to them and collaborating with them, getting their thoughts and perspectives and learning from new resources and attending new trainings has been really helpful within our organization. And then framing equity in terms of organizational goals. For us, this is internally our organization, but whatever organization that you were working with or working for, looking at their goals and how do you align that? And how do you ensure that their goals are aligned with the framing of your equity evaluation and then presenting that to them so that they can see the value in the merit behind the health equity evaluation? So the last few are just highlighting compliance and funding incentives and finding those and then sharing them with the funders as well as the decision makers within your organization to continue on those, those health equity evaluations. Leverage success stories in case studies. So, as you're designing and developing your evaluation, you should be gathering success stories. And so those could be shared within your evaluation or outside to the decision makers or the policy makers. And so, they can see the value within a health equity evaluation design. And then just continue that continuous dialogue, engage with those that believe in the health equity designs and the have the importance of it, but also engage with those that don't and understand and so that they can understand. So, sharing the value within this type of design and why it's important for the communities that we're serving.

EK: We hope you enjoyed this episode of Leading Public Health, a podcast from the Region IV Public Health Training Center at Emory University. We value your feedback, so please take a minute to complete the evaluation located in the show notes. Thank you for joining us.