



# Guide for Project Planning and Evaluation

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## A. Background and Purpose

BC Renal's Guide for Project Planning and Evaluation takes you through a seven-step process that provides standards for project planning and evaluation across the BC Renal network. While the process encourages consistency in project planning and evaluation, it also allows for flexibility to meet the needs of each project or initiative. To help simplify the process, templates are referenced and linked throughout.

The Guide for Project Planning and Evaluation was informed by a review of existing frameworks and models across Canada and international jurisdictions, gaps identified via stakeholder consultations, and a review of existing processes and documents within BC Renal. Its development was supported by a project advisory group of key stakeholders.

By having a standard approach to project planning and evaluation for all new initiatives, BC Renal will have a more consistent and effective way to track progress and report successes and challenges across the organization and to our stakeholders. The seven-step process and this step-by-step guide are meant to promote a common understanding of, and a practical approach to, project planning and evaluation that can be easily adapted and used for BC Renal initiatives going forward.

## B. Strategic Alignment and Scope

In the 2018 strategic plan, Strategic Priority #2 focuses on innovation and research in renal care with Objective 2 highlighting the need to, ***“Create a consistent methodology and processes for introduction and evaluation of projects or new activities.”*** Evaluation is also called out specifically in the Provincial Health Services Authority (PHSA) 2019-2020 service plan, objective 1.4: ***“Effective provincial clinical policy development, implementation and evaluation”*** in alignment with the Ministry of Health Goal to ensure a focus on service delivery areas requiring strategic repositioning.

The BC Renal Guide for Project Planning and Evaluation provides step-by-step guidance in project planning, development and evaluation embedded within project management methodology. The scope and scale of each initiative, project or program of work may vary. Therefore, the guidance within this document may be adapted according to specific project requirements and feedback from key stakeholders.

The seven-step process applies to BC Renal-led provincial initiatives that are cross-cutting or led by provincial modality committees. The following are key groups of individuals involved in project planning and evaluation at BC Renal:

- Leadership team
- Project managers and leads
- Administrative coordinators
- Provincial committee chairs and members
- Research teams and evaluators
- Patient and family partners should be considered as per below
- Health Authority Renal Program (HARP) administrators

## C. What is Project Planning and Evaluation?

Many healthcare administrators are familiar with some kind of structure for project planning. They may be less familiar with how evaluation planning fits into the process. Planning out a project to ensure the problem and/or need has been defined and figuring out how it will be addressed is the first step in effectively developing and

implementing an evaluation. Evaluation planning comes down to two questions: What are the desired outcomes of your project? How will you measure them?<sup>11</sup>

### C.1. Evaluation Definitions

The Government of Canada defines evaluation as "the systematic collection and analysis of evidence on the outcomes of programs to make judgments about their relevance, performance and alternative ways to deliver them or to achieve the same results"<sup>2</sup> The National Health System (NHS) in the United Kingdom (UK) more broadly defines evaluation as the "systematic assessment of the implementation and impact of a project, programme or initiative. Evaluation is about: checking that you are doing things right and checking that you are doing the right thing."<sup>3</sup>

### C.2. Evaluation and BC Renal

**Evaluation is essential to BC Renal’s Mission:** The BC Renal network is responsible for the coordination and funding of outstanding kidney patient care, and acts as a catalyst for research, knowledge translation and innovation.

**Evaluation also is underpinned as part of the following BC Renal core values:**

- **People** - We are passionate about and dedicated to improving the lives of those dealing with kidney disease. Our **success is measured** through patients' access to care, health outcomes and quality of life;
- **Knowledge** - Our work – be it clinical, financial or administrative – is informed by the **best available knowledge, research and evidence**;
- **Transparent** –We strive to have an open and honest relationship with our staff and our community. We are committed to **process improvement** and being transparent about how decisions are made.

### C.3. Terms to Highlight

**Table 1**

<b>Term</b>	<b>Description</b>
<b>Project</b>	<ul style="list-style-type: none"> <li>• A temporary endeavor undertaken to create a unique project service or result. Projects are temporary and close down on the completion of the work they were chartered to deliver.</li> </ul>
<b>Program</b>	<ul style="list-style-type: none"> <li>• A group of related projects managed in a coordinated way to obtain benefits and control that are not available from managing them individually. Programs may contain elements of work outside of the scope of the discrete projects in the program.</li> </ul>
<b>Logic Model</b>	<ul style="list-style-type: none"> <li>• It a structured diagram which connects outcomes with activities and specifies reach (or target groups) for those activities. It is a tool to help with planning and provides a “theory of change”. A logic model leads to evaluation questions which frames out the evaluation.</li> </ul>
<b>Driver Diagram</b>	<ul style="list-style-type: none"> <li>• A type of structured logic chart with three or more levels. It is a tool to help with planning and provides a “theory of change.”</li> </ul>

Term	Description
<b>Evaluation</b>	<ul style="list-style-type: none"> <li>• The systematic collection and analysis of evidence on the outcomes of programs to make judgments about their relevance, performance and alternative ways to deliver them or to achieve the same results.</li> <li>• An objective process of understanding how a policy or other intervention was implemented, what effects it had, for whom, how and why.</li> <li>• It is about checking that you are doing things right and checking that you are doing the right thing.</li> </ul>
<b>Evaluation Strategy</b>	<ul style="list-style-type: none"> <li>• A high-level overview of the evaluation plans for a program.</li> </ul>
<b>Evaluation Plan</b>	<ul style="list-style-type: none"> <li>• A written document that describes the overall approach or strategy that will be used to guide the evaluation. It includes information on why the evaluation is being conducted, what will be done, who will do it, when will it be done, how evaluation findings will likely be used.</li> </ul>
<b>Evaluation Framework</b>	<ul style="list-style-type: none"> <li>• A tool used to organize and link evaluation questions, outcomes or outputs, indicators, data sources, and data collection methods.</li> </ul>
<p><i>Note</i> Data for descriptions found through the internet scan in Canada from Government of Canada (2010)<sup>2</sup> and Alberta Health Services Addiction and Mental Health Partnership Program<sup>7</sup> in U.K. from Innovate UK (2018)<sup>8</sup>, NHS Institute for Innovation and Improvement (2012)<sup>3</sup>, NHS Scotland (2012-2019)<sup>9</sup> and Project Management Institute (2010)<sup>12</sup></p>	

## D. What are the Benefits of a Standard Approach?

Using a standard approach to project planning and evaluation has a number of benefits that can enhance the likelihood of project success. Some of the benefits include:

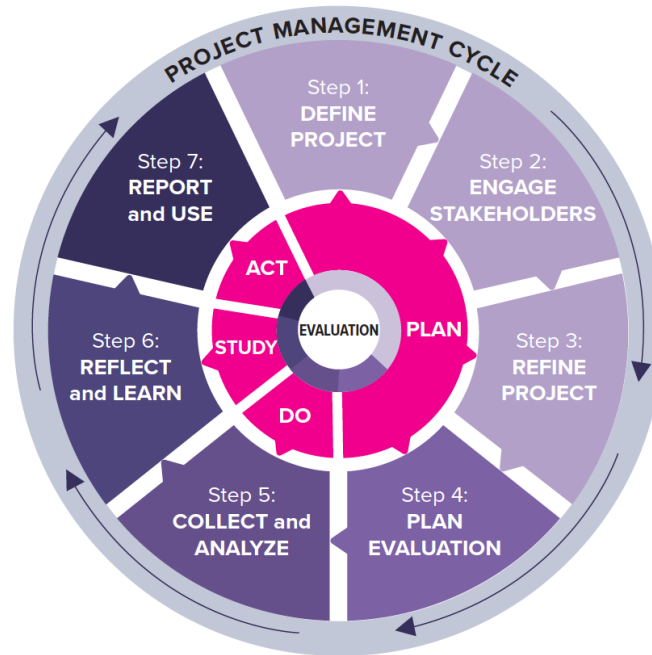
- Increasing the likelihood of project goals and objectives being met
- Encouraging effective use of money, human resources and talent
- Helping identify specific components of an initiative that worked well and what could be improved
- Supporting decision-making that ultimately can improve healthcare service delivery to our patients

## E. BC Renal Process for Project Planning and Evaluation

BC Renal's **7-Step Process for Project Planning and Evaluation (Figure 1)** aligns with the quality improvement process of plan, do, study, act<sup>1</sup> and the steps are embedded in the project life cycle: plan, implement, communicate and disseminate. Reference to plan, do, study, act within the seven steps is not equal to the rapid plan, do study, act cycle in formal quality improvement methodology but rather is borrowing the key concepts and importance of each of those steps within project work particularly for those projects or initiatives that are focused on quality improvement.

- **Steps 1 through 3** are focused on **project planning** as a whole with consideration of evaluation within those steps.
- **Step 4** delves into **evaluation planning** in more detail once the project has been defined with key stakeholder input.
- **Steps 5 through 7** focus on **implementation** and ensuring **use and communication** of the evaluation results.

**Figure 1:**  
**7-Step Process for Project Planning and Evaluation**



### E.1. Evaluation Standards

In addition to the seven steps, there are evaluation standards that will enhance the quality of evaluations by guarding against potential mistakes or errors in practice. The evaluation standards are grouped around five important attributes: utility, feasibility, propriety, accuracy and evaluation accountability.

**Utility:** Serve information needs of intended users.

**Feasibility:** Be realistic, prudent, diplomatic and frugal.

**Propriety:** Behave legally, ethically, and with due regard for the welfare of those involved and those affected.

**Accuracy:** Evaluation is comprehensive and grounded in the data.

**Evaluation Accountability:** Encourage adequate documentation of evaluations and a meta-evaluative perspective focused on improvement and accountability for evaluation processes and products.

These standards should be taken into consideration as part of the evaluation process.<sup>4</sup>

## F. Patient and Family Engagement in Project Planning and Evaluation

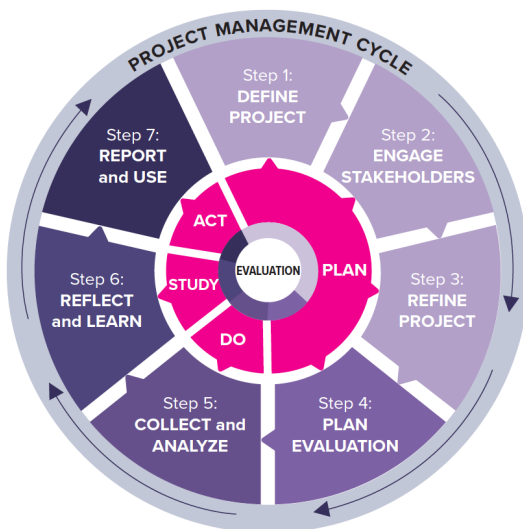
The [BC Renal Patient and Family Engagement Framework](#) outlines the importance of partnering with patient and family voices where applicable in improvement efforts to ensure person- and family-centred kidney care, and ultimately, to optimize patient experience and outcomes. The framework is a foundational guide to authentic and meaningful patient and family engagement in BC Renal. Therefore, it is strongly recommended that project teams consider the involvement of patients and families and apply the framework and its **7-Step Circle of Patient and Family Engagement (Figure 2)** in parallel to our **7-Step Process for Project Planning and Evaluation**, as appropriate.

Throughout the seven-step project planning and evaluation process detailed below, there are reference links to the [Patient and Family Engagement Framework](#). In addition, depending on the purpose and scope of a project, the Patient and Family Engagement Framework may also be applicable for individual phases in the project cycle (e.g., patient partners involved in the project team versus patient partners involved in the project implementation).

For any inquiry and assistance in these regards, please contact [patientengagement@bcrenal.ca](mailto:patientengagement@bcrenal.ca).

**Figure 1:**

**7-Step Process for Project Planning and Evaluation**



**Figure 2:**

**7-Step Circle of Patient and Family Engagement**



## G. How Can I Use the BC Renal Guide for Project Planning and Evaluation?

As a reminder from the Background and Purpose section, the seven-step process is meant to provide a standard approach to projects and their evaluation across the BC Renal network. The depth of planning and evaluation will depend on the scope and scale of the project. All steps in this guide should be considered, but not all steps may necessarily apply to the same degree. Projects that are more task-oriented, operational, or research-based may require a modified version. Roles and responsibilities will vary based on project scope and scale.

The project descriptions in Table 2 below are meant to provide a reference of how you might determine whether all or some of the steps and activities outlined in the guide are applicable to a project. However, whether a project is small, medium or large, evaluation should be considered when defining the project in Step 1 of the guide. Scope and scale of the evaluation will depend on the size of the project, strategic impact of the initiative as well as human resources and funding available.

**Table 2**

Project Description	Project Type	Human Resources	Timeline	Budget	Outcomes	Review	Examples
<ul style="list-style-type: none"> <li>Aligns with a single modality committee's goal and objectives</li> <li>Need/problem is clear, and solution is readily achievable</li> </ul>	Small - Level 1	<ul style="list-style-type: none"> <li>Project manager</li> <li>Small working group (1-2 people)</li> </ul>	Under 6 months	None	Affects one modality only	<ul style="list-style-type: none"> <li>Modality committee members</li> </ul>	<ul style="list-style-type: none"> <li>Resource and/or tool development</li> </ul>
<ul style="list-style-type: none"> <li>Affects more than one modality committee and may link to other initiatives</li> <li>Need/problem is unclear, and solution may be more difficult to achieve</li> </ul>	Medium - Level 2	<ul style="list-style-type: none"> <li>Project manager</li> <li>Larger working group with representation by key stakeholders</li> </ul>	6-12 months	Yes	May affect more than one modality	<ul style="list-style-type: none"> <li>Modality committees impacted</li> <li>Core committee members</li> <li>Leadership team if required</li> </ul>	<ul style="list-style-type: none"> <li>Transition guides</li> <li>PD Rural project</li> </ul>
<ul style="list-style-type: none"> <li>Directly links to key initiative outlined in BC Renal strategic plan</li> <li>Need/problem is unclear, and solution will require full project management process</li> </ul>	Large - Level 3	<ul style="list-style-type: none"> <li>Project manager</li> <li>Large, diverse multidisciplinary working group required with representation from internal and external stakeholders</li> </ul>	Over 12 months	Yes	Linked to strategic plan	<ul style="list-style-type: none"> <li>Core committee members</li> <li>Leadership team</li> </ul>	<ul style="list-style-type: none"> <li>PD Assist</li> <li>ADPKD</li> <li>Transplant First</li> </ul>



# 1 7-Step Process for Project Planning and Evaluation

## 1.1 Planning Phase (Steps 1 to 4): PLAN

Through the project life cycle, **planning** is highlighted as the **most crucial phase**. Therefore, much time is required during this phase to ensure project success. Project planning should be thoughtful and collaborative while avoiding the risk of over-planning and not being able to move towards implementation. The planning phase includes Step 1 through Step 4 of the seven-step process. Key components of the planning phase are outlined in the steps below.

### Step 1: Define Project

Defining the purpose of the project is foundational to project and evaluation planning. In order to ensure that the purpose aligns with BC Renal strategic objectives and that the project is feasible, there are key review steps that are required before moving forward with any project.

The following outlines the key activities and roles and responsibilities for **Step 1** in the **planning** phase. (You can use the boxes and circles as checkboxes as you go through the process.)

#### Key Activities for Defining the Project

- Identify problem/quality improvement (QI) area.
  - Conduct a needs assessment/current state review.
- Set SMART goal/objectives and ensure strategic alignment.
  - Define goal/objectives based on the problem or what you are trying to accomplish.
  - Define key deliverables and estimated timelines.
- Identify key stakeholders including proposed project team membership (e.g., committee members inclusive of patient and family perspective; refer to Step 1-2 of the Patient and Family Engagement Framework: [http://www.bcrenalagency.ca/resource-gallery/Documents/Pt\\_Eng-Patient\\_and\\_Family\\_Engagement\\_Framework.pdf](http://www.bcrenalagency.ca/resource-gallery/Documents/Pt_Eng-Patient_and_Family_Engagement_Framework.pdf)). For assistance, please contact [patientengagement@bcpra.ca](mailto:patientengagement@bcpra.ca)
- Estimate human resource requirements, e.g., funding, personnel, support. This may include BC Renal communications, PROMIS, analytics, etc. Identifying the resources required and available upfront will help these other teams assess if they have resources available when required to support the project and makes plans to do so, if feasible.
- Complete BC Renal Committee project proposal form (see template below).

#### Roles and Responsibilities for Defining the Project

Role	Responsibilities
BC Renal committee chair/lead or delegated committee member	<ul style="list-style-type: none"><li>• Assume ownership and accountability for BC Renal provincially-led projects/initiatives</li><li>• Provide feedback on materials, content and approach</li><li>• Review/approve all documents, materials, etc.</li></ul>
BC Renal project manager	<ul style="list-style-type: none"><li>• Work with chair/lead/delegated member to define the project at a high level and identify key stakeholders</li><li>• Complete the BC Renal Project Proposal form with review/approval from chair/lead/delegate</li></ul>

	<ul style="list-style-type: none"> <li>Escalate project proposal through to the BC Renal provincial committee or BC Renal Leadership team for feasibility assessment and approval</li> </ul>
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Once there is formal approval of the project (see Appendix 9.1.1. for project review/approval process) you will move into Step 2 of the planning phase.

### Tools and Templates for Defining the Project

- BC Renal Project Review Process (See Appendix)
- BC Renal Committee Project Proposal Template: <http://www.bcrenalagency.ca/resource-gallery/Documents/Committee%20Project%20Proposal%20Template.pdf>

## Step 2: Engage Stakeholders

There are many benefits to engaging stakeholders early on in the project. Stakeholders can help clarify the problem, define the goal and objectives of the project, provide feedback on what’s most important, support implementation activities and ensure results of the project get communicated and disseminated to the right people.

The following outlines the key activities and roles and responsibilities for **Step 2** in the **planning** phase.

### Activities for Engaging Stakeholders

- Ensure stakeholders are engaged from the beginning.
  - Define primary and secondary stakeholders and proposed communication approach.
  - Set up governance structure for program/project.
  - Establish a project team with relevant stakeholders (includes evaluation resource, data analysis/statistician resource, patient and family perspective; refer to Step 1-3 of the Patient and Family Engagement Framework: [http://www.bcrenalagency.ca/resource-gallery/Documents/Pt Enga-Patient and Family Engagement Framework.pdf](http://www.bcrenalagency.ca/resource-gallery/Documents/Pt%20Enga-Patient%20and%20Family%20Engagement%20Framework.pdf))

### Roles and Responsibilities for Engaging Stakeholders

Role	Responsibilities
BC Renal committee chair/lead or delegated committee member	<ul style="list-style-type: none"> <li>Provide feedback on materials, content and approach</li> <li>Review/approve all documents, materials, etc.</li> </ul>
BC Renal project manager	<ul style="list-style-type: none"> <li>Develop draft project charter</li> <li>Draft primary and secondary stakeholders and communication approach</li> <li>Create governance structure for project unless leveraging existing structures (e.g., committees)</li> </ul>

	<ul style="list-style-type: none"> <li>• Draft project team membership or confirm leveraging an established group of key stakeholders (Provincial committee members, patient partner representation)</li> <li>• Confirm human resources available to support evaluation throughout the project</li> <li>• Prepare for project kick-off with project team or established group</li> </ul>
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## Tools and Templates for Engaging Stakeholders

- Project Charter Template

## Step 3: Refine Project

This step involves further describing the project in more detail. A full description clarifies project purpose, stage of development, activities, human resource needs and context for implementation. This will also provide clarity on project outcomes, which in turn will form the basis of the evaluation framework and plan.

The following outlines the key activities and roles and responsibilities for **Step 3** in the **planning** phase.

### Activities for Refining Project

- Further describe project/program to define project scope.
- Use a planning tool, e.g., theory of change to clearly define the project and the extent to which it should be evaluated. A project logic model or driver diagram can help clearly define the outcomes for the project and form the basis of the evaluation framework.
- Confirm/refine project goal and objectives with stakeholders (e.g., committee or project team inclusive of patient and family perspective; refer to Step 4 of the Patient and Family Engagement Framework: [http://www.bcrenalagency.ca/resource-gallery/Documents/Pt\\_Engagement\\_and\\_Family\\_Engagement\\_Framework.pdf](http://www.bcrenalagency.ca/resource-gallery/Documents/Pt_Engagement_and_Family_Engagement_Framework.pdf))
- Develop a project plan with detailed activities and timelines.

### Roles and Responsibilities for Refining Project

Role	Responsibilities
BC Renal committee chair/lead or delegated committee member	<ul style="list-style-type: none"> <li>• Provide feedback on materials, content and approach</li> <li>• Review/approve materials, content and approach</li> </ul>
BC Renal project manager	<ul style="list-style-type: none"> <li>• Finalize project charter by obtaining relevant reviews/approvals</li> <li>• Develop and refine draft project logic model or driver diagram</li> <li>• Develop and refine project plan</li> </ul>
Project team or committee	<ul style="list-style-type: none"> <li>• Review/approve terms of reference (if applicable)</li> <li>• Endorse project goal and objectives</li> <li>• Endorse project logic model or driver diagram or project overall approach</li> </ul>

## Tools and Templates for Refining Project

- Project Charter Template
- Logic Model and Driver Diagram Template
- Project Plan Template

## ➔ Step 4: Plan Evaluation

A shared understanding of the project and what the evaluation can and cannot deliver is essential to the success of implementation of evaluation activities and use of evaluation results. This highlights the importance of having a small evaluation working group that includes stakeholders who have the greatest stake or interest in the evaluation.<sup>5</sup> This group should be consulted throughout the planning and evaluation cycle (e.g., planning through to communication and dissemination) and report up to the project team/committee.

The evaluation working group will help determine the methods of assessing whether the project/program was effective (and why). Establishing a clear evaluation goal and set of evaluation objectives in alignment with the overall project/program goal and objectives and theory of change is valuable for the development of an evaluation framework and plan.

The following outlines the key activities and roles and responsibilities for **Step 4** in the **planning** phase.

### Activities for Planning Evaluation

- Set-up an evaluation working group (“working group”) of 8-10 key stakeholders (size of group may vary depending on size and scope of project).
- Identify context for evaluation and audience (includes evaluation goal and objectives aligned with overarching project/program goal and objectives).
  - Consider including patient and family engagement evaluation during evaluation planning; refer to Step 7 in the Patient and Family Engagement Framework:  
[http://www.bcrenalagency.ca/resource-gallery/Documents/Pt\\_Eng-Patient\\_and\\_Family\\_Engagement\\_Framework.pdf](http://www.bcrenalagency.ca/resource-gallery/Documents/Pt_Eng-Patient_and_Family_Engagement_Framework.pdf)
- Define evaluation framework based on the outcomes described in the project theory of change. The evaluation framework links evaluation questions, outcomes or outputs, indicators (measures), data sources and data collection methods, including the following elements<sup>7</sup>:
  - Evaluation questions: The use of a Population, Exposure, Comparator, Outcome (PECO) statement can provide a framework for developing the key questions that the project evaluation is trying to answer.
  - Outcome objectives in measurable terms
  - Output and outcome indicators: Include measurement of soft outcomes (test knowledge and awareness carefully and consider sustainability).
  - Process monitoring

- Data collection: Consider the following:
  - Best methods, e.g., qualitative (surveys, checklists, database extraction) and/or quantitative (focus groups, interviews), mixed method approach. The method should align with the evaluation questions and/or outcome objectives.
  - Data sources available, e.g., PROMIS, CIHI, Pharmacare
  - Resources, skills and capacity to do the collection
  - Confidentiality/privacy: Is consent required?
  - Is Research and Ethics Board (REB) approval required? See more information here: <http://www.phsa.ca/our-research/participate/ethics-oversight>
- The evaluation framework may change based on what is determined to be most important, resourcing and timelines as well as feedback from the evaluation working group – see below.
- Define scope and timelines of evaluation to inform resource requirements.
  - Prioritize and be realistic on what to measure based on scope and resources. E.g., what is most crucial? What is most important to our stakeholders? Is the project time-limited?
  - Align evaluation timelines with project timelines as per project plan. Ensure there is adequate time for each step in the process including review and feedback from relevant stakeholders.
  - Identify human resources required through each of the evaluation steps/phases. E.g., what types are required to support evaluation through the evaluation cycle? What would be the time commitment? (At a minimum, human resources to support project evaluation include: chair/lead, project manager, analyst, evaluation resource)
- Develop an evaluation plan inclusive of a communication plan to ensure lessons learned and findings are communicated and disseminated to defined stakeholders in the project charter.
  - The evaluation plan should include the following information<sup>7</sup>:
    - Project/program description including goal and objectives and theory of change
    - Evaluation goal and objectives including scope
    - Evaluation framework inclusive of evaluation questions, output and/or outcomes and indicators/measures, data collection methods including data sources
    - Data analysis approach
    - Ethical considerations (if applicable)
    - Milestones and timelines
    - Evaluation governance structure and reporting timelines
    - Human resources including roles and responsibilities (RACI chart)
    - Communication and dissemination plan
  - Have the evaluation working group review and approve the plan.

## Roles and Responsibilities for Planning Evaluation

Role	Responsibilities
BC Renal committee chair/lead or delegated committee member	<ul style="list-style-type: none"> <li>Review/approve materials and approach</li> <li>Provide feedback on content and evaluation working group membership</li> </ul>
BC Renal project manager	<ul style="list-style-type: none"> <li>Draft working group membership list and terms of reference, team invites and set-up kick-off meeting</li> <li>Review and refine draft evaluation goal and objectives, draft project logic model or driver diagram with chair/lead/delegate and working group</li> <li>Draft evaluation framework based on theory of change</li> <li>Draft evaluation plan</li> <li>Review and refine evaluation framework with working group</li> <li>Review and refine evaluation plan with working group</li> <li>Status reporting to project team or committee</li> </ul>
Analyst/statistician	<ul style="list-style-type: none"> <li>Provide feedback into data collection methods and sources</li> <li>Provide a time estimate for analyzing the data and interpreting results to inform human resource requirements and timelines</li> </ul>
Evaluation working group	<ul style="list-style-type: none"> <li>Endorse evaluation goal and objectives and project logic model/driver diagram in alignment with overarching project goal and objectives</li> <li>Endorse evaluation framework and plan</li> </ul>

### Tools and Templates for Planning Evaluation

- Logic Model or Driver Diagram template
- Evaluation framework template
- Evaluation plan template
- Communication plan template

## 1.2 Implementation Phase (Steps 5 and 6): DO and STUDY

The active phase of **implementation** follows all the planning that was done in the initial phases of a project. This phase primarily focuses on collecting, analyzing and interpreting the data.

The following outlines the key activities and roles and responsibilities for **Step 5** in the **implementation phase, Collect and Analyze**.

### Step 5: Collect and Analyze

Data collection methods need to be planned out and documented in the evaluation plan along with the strategy for data analysis. Outlining the approach up front will ensure that the right human resources with the right skill set are identified to support data collection and analysis and that there is enough time built into the plan.

## Activities for Collecting and Analyzing

- Collect data
  - Follow the methods and timelines outlined in the evaluation plan.
  - Ensure data collection, storage and analysis methods are feasible.
  - Check quality and consistency of data before and after analysis.
  - Keep data organized and in a format that can be easily summarized.
  - Document data collection process and any issues that arise. This could provide important information when reviewing results and a better understanding of the quality of the data collected.
- Analyze and interpret data
  - Ensure there is enough time built into the plan to compile, clean and analyze the data whether it be quantitative or qualitative.
  - Document how the data was treated and analyzed in order to provide context for the results.
  - Results should be interpreted with the project goal and objectives in mind and comparing your results to the expected outcomes and original evaluation questions/objectives.
  - Anchor the interpretation to the original evaluation questions.
  - Consider patient and family perspectives where relevant through analysis and interpretation of the data; refer to Step 5 of the Patient and Family Engagement Framework:  
[http://www.bcrenalagency.ca/resource-gallery/Documents/Pt\\_Engagement\\_and\\_Family\\_Engagement\\_Framework.pdf](http://www.bcrenalagency.ca/resource-gallery/Documents/Pt_Engagement_and_Family_Engagement_Framework.pdf)

## Roles and Responsibilities for Collecting and Analyzing

Role	Responsibilities
BC Renal committee chair/lead or delegated committee member	<ul style="list-style-type: none"><li>• Provide feedback on content</li></ul>
BC Renal project manager or analyst/statistician	<ul style="list-style-type: none"><li>• Collect and compile data as per evaluation plan</li><li>• Document data collection and data analysis process including any issues that arise</li><li>• Conduct review, analysis and interpretation of data as per evaluation plan</li></ul>
Evaluation working group	<ul style="list-style-type: none"><li>• Provide feedback</li></ul>

## Tools and Templates for Collecting and Analyzing

The tools and templates for data collection are customized to individual projects. For example: surveys, interview/focus group transcripts, PROMIS data, chart audit data, etc.

## ➔ Step 6: Reflect and Learn

Involving the evaluation working group through this step is critical to ensuring the evaluation findings and conclusions are meaningful. It also adds a level of credibility to the results in preparation for communication and dissemination. Discussing preliminary findings along the way with the working group can help guide the process of interpreting the data and lead to more thoughtful conclusions. Step 5 and 6 are iterative, as results are presented to the working group and feedback is provided.

The following outlines the key activities and roles and responsibilities for **Step 6** in the **implementation phase**.

### Activities for Reflecting and Learning

Involving the evaluation working group from the beginning will support justifying conclusions drawn from the data especially if the group is involved through Step 5. Both the conclusions and lessons learned will be essential to document and will also be important to communicate and share with project stakeholders (Step 7).

- Justify conclusions
  - Review all (positive or negative) findings with working group and discuss implications for future project/program work including sustainability.
    - Include patient and family partners in the discussion; refer to Step 5-7 of the Patient and Family Engagement Framework: [http://www.bcrenalagency.ca/resource-gallery/Documents/Pt\\_Enga-Patient\\_and\\_Family\\_Engagement\\_Framework.pdf](http://www.bcrenalagency.ca/resource-gallery/Documents/Pt_Enga-Patient_and_Family_Engagement_Framework.pdf)
  - Create a list of recommended actions that address your outcomes.
- Reflection and Learning
  - Capture the project's results, lessons learned for future project or program work.
  - Develop key recommendations based on the results.
  - Leverage documented findings to develop communication materials for targeted audiences.

### Roles and Responsibilities for Reflecting and Learning

Role	Responsibilities
BC Renal committee chair/lead or delegated committee member	<ul style="list-style-type: none"><li>• Provide feedback and endorsement</li><li>• Review and approve content</li></ul>
BC Renal project manager or analyst/statistician	<ul style="list-style-type: none"><li>• Review results with chair/lead/delegate and evaluation working group along the way</li><li>• Status reporting to project team or committee</li><li>• Document project results, lessons learned and key recommendations</li></ul>
Evaluation working group	<ul style="list-style-type: none"><li>• Provide feedback and endorsement</li></ul>



## Tools and Templates for Reflecting and Learning

There are no tools or templates at this time.

### 1.3 Communication and Dissemination Phase (Step 7): ACT

Effective communication is key in the evaluation process because it helps:

- convey knowledge
- facilitate understanding
- create meaning
- confirm or challenge theories or previous ways of thinking, and
- inform decision-making and action.<sup>6</sup>

The communication and dissemination plan should be included in the evaluation plan noted in Step 4. Communication to key stakeholders should occur through the evaluation cycle and be clearly outlined in the communication plan.

#### Step 7: Report and Use

The following outlines the key activities and roles and responsibilities for **Step 7** in the **Communication and Dissemination phase**.

#### Activities for Reporting and Use

- Communicate/Report results
  - Include evaluation working group and project team in the reporting process.
  - Ensure regular reporting to key stakeholders along the way as per defined communication and dissemination plan outlined during the planning phase.
  - Provide patient and family partners and the broader community of how patient voices were incorporated along the way and how it contributed to project results; refer to Step 6 of the Patient and Family Engagement Framework: [http://www.bcrenalagency.ca/resource-gallery/Documents/Pt\\_Enga-Patient\\_and\\_Family\\_Engagement\\_Framework.pdf](http://www.bcrenalagency.ca/resource-gallery/Documents/Pt_Enga-Patient_and_Family_Engagement_Framework.pdf)
  - Clearly state whether the project met its goal and objectives.
  - Outline any consequences for the project, program or organization based on the results.
  - Be objective.
  - Tailor communication to the audiences' specific interests and how they plan to use the results.
  - Keep it simple.
- Ensure use and share lessons learned.
  - Share both successes and failures and opportunities to be more effective in the future. Always lead with successes.

- Consider the approach to communicating lessons learned with stakeholders, e.g., group or individual discussion, briefing note, summary report.
- Develop an action plan with the evaluation working group to share findings and promote use.

Communication approach is key to ensuring use of findings.

### **Roles and Responsibilities for Reporting and Use**

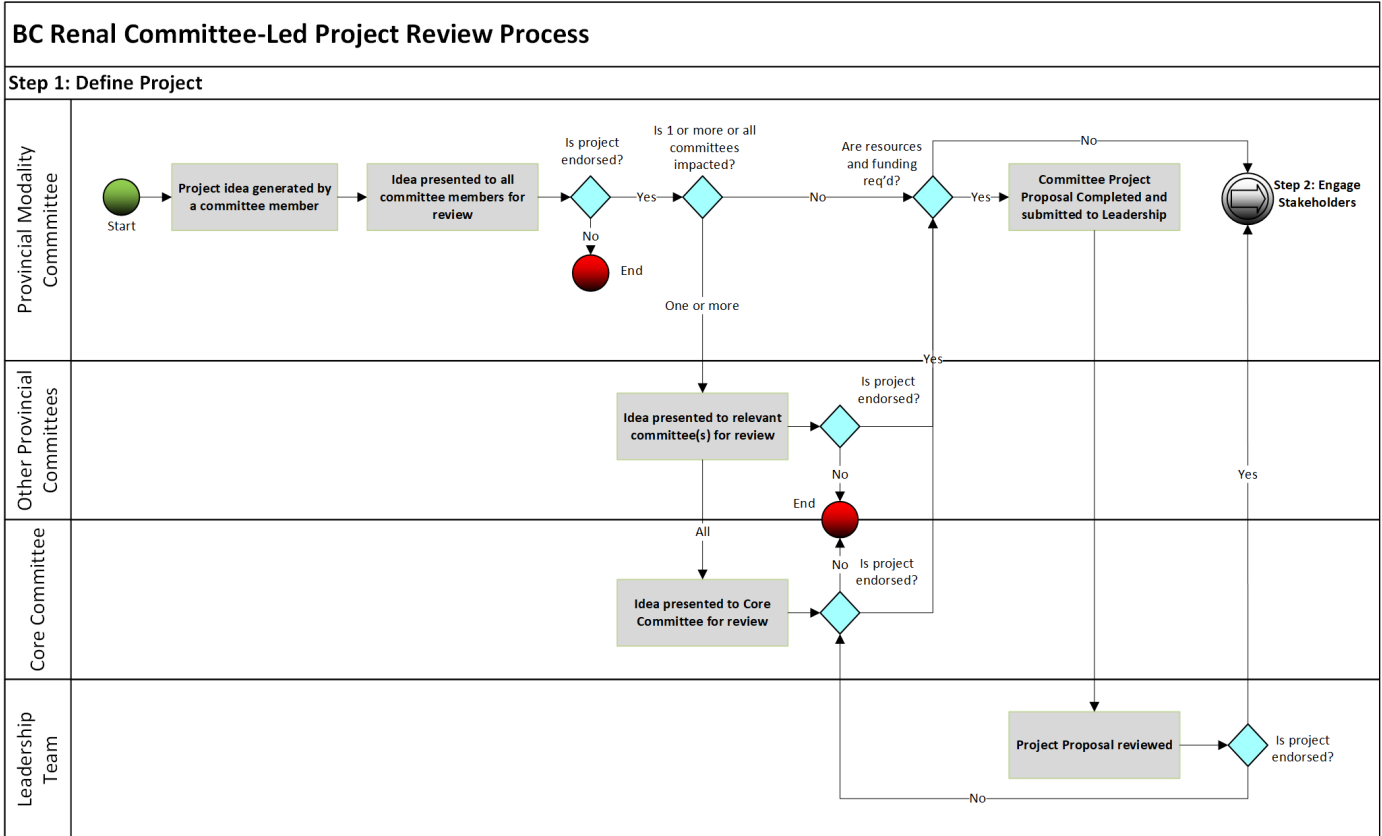
<b>Role</b>	<b>Responsibilities</b>
BC Renal committee chair/lead or delegated committee member	<ul style="list-style-type: none"> <li>• Provide feedback and endorsement</li> <li>• Review and approve content</li> </ul>
BC Renal project manager and analyst/statistician	<ul style="list-style-type: none"> <li>• Report final results to evaluation working group</li> <li>• Develop action plan with working group</li> <li>• Finalize communication approach to targeted audiences</li> </ul>
Evaluation working group	<ul style="list-style-type: none"> <li>• Provide feedback and endorsement</li> </ul>

### **Tools and Templates for Reporting and Use**

- Communication and Dissemination plan template

## 2 Appendix

### 2.1 Project Review Process



### 3 References

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