

Evaluation of Health Care for the Homeless Programs: Participant Workbook



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Evaluation Resources

General Resources

- [*Creating Authentic, Effective Partnerships between Organizations & People with Lived Experiences: A Toolkit*](#). UCSF Benioff Homelessness and Housing Initiative; 2024.
- [*Measuring What Matters in Public Health: A Health Department's Guide to Performance Management*](#). The National Association of County and City Health Officials; 2018.
- [*Preparing for an Evaluation*](#). CDC Division of Violence Prevention VetoViolence; 2021.
- [*Institute for Social Research*](#). University of Michigan
- [*Program Evaluation Toolkit: Quick Start Guide*](#). Institute of Education Sciences, 2021.

Logic Models

- [*Framework Checklist Step 2*](#). CDC, Office of Policy, Performance, and Evaluation; 2018.
- [*Logic Models: A Beginner's Guide*](#). Indiana Youth Institute.
- [*Logic Model Development Guide*](#). W.K. Kellogg Foundation; 2004.

Measure Development

- [*Developing Evaluation Indicators*](#), CDC National Center for HIV/AIDS, Viral Hepatitis, STD, and TB Prevention, Division of STD Prevention.
- [*Indicators - CDC Approach to Evaluation*](#). CDC Office of Policy, Performance, and Evaluation; 2021.

Writing Good Questions

- [*Program Evaluation Tip Sheet: Constructing Survey Questions*](#). CDC Division for Stroke Prevention; 2011.
- [*Care & Intention in Research: Tips on Creating Surveys for Youth with Lived/Living Experiences of Homelessness*](#). Jean, M, Canadian Observatory on Homelessness; 2023.
- [*Resources For Survey Planning, Design and Implementation*](#). Office of Institutional Research and Assessment, Mount Wachusett Community College.

Dissemination

- [*Quick-Start Guide to Dissemination for Practice-Based Research Networks*](#), AHRQ PBRN Resource Center; 2014.
- [*Step 6: Use and Share Lessons Learned*](#). Division of Violence Prevention VetoViolence; 2021.

To access a web version of this document with hyperlinks, please scan this QR code.



Identifying Evaluation Purpose and Questions

This handout will help you identify and prioritize evaluation questions to help you focus the evaluation for the Evaluation Purpose section of the evaluation plan. This handout will also help you implement Step 3 of the evaluation process.

Identify Evaluation Purpose

Program evaluation comes in different shapes, sizes, and scopes and various factors may affect your evaluation approach and decisions. To select the best design for your evaluation, you must determine the purpose for your evaluation including the evaluation questions. These questions are driven by the users and their use of the evaluation findings. The Types of Evaluation tip sheet may also help you identify the purposes and uses of your evaluation.



Examples of common purposes

- Gain better understanding about your program
- Identify what is, isn't working, and where improvements can be made
- Determine whether there are any unintended effects
- Find out if there are additional needs not currently addressed by the program
- Determine whether you're using resources efficiently and appropriately

Examples of common uses

- To make improvements to the program
- To make decisions about how to allocate or use your resources
- To make decisions about which program activities to continue, change, and/or end
- To plan your next evaluation
- To mobilize community support

Identify Evaluation Questions

Having clear evaluation questions will help you focus your evaluation so that you can get the information you need. Different questions (process and/or outcome) can be part of a program evaluation and are informed by:



The components of the program and desired outcome:

Your logic model can help guide the evaluation focus and questions. Look at individual components as well as connections between the components.



How long the program has been in existence:

Where you are in program implementation can help prioritize which evaluation questions to focus on.



Surrounding context and population of focus:

Context can influence both the implementation and the outcomes of a program. Including evaluation questions that examine context can help explain:

- variation in outcomes across contexts, populations, or situations
- intended and unintended consequences of programs
- different mechanisms of change and results for specific contexts, populations, or situations



Stakeholder interests:

Review information about your stakeholders and reconsider and confirm their roles, interests, and priorities. Engaging key stakeholders help focus the evaluation on where stakeholders are most ready and committed to answering through an evaluation process.

As you develop your evaluation questions, keep in mind that the questions should be:

- **Relevant**—reflective of key goals, objectives, and outcomes of the program
- **Reasonable**—logical and practical
- **Answerable**— able to be answered with the resources available
- **Balanced**— selected to inform decisions and make improvements



Use the table on the following page to help you identify your evaluation purpose, users, and uses. To fill out this PDF, you can type directly into the text fields using a PDF editor or print a copy to complete by hand.



Additional Resources for Developing and Prioritizing Evaluation Questions





- https://www.cdc.gov/asthma/program_eval/AssessingEvaluationQuestionChecklist.pdf
- https://www.betterevaluation.org/en/rainbow_framework/frame/specify_key_evaluation_questions
- <https://www.cdc.gov/std/Program/pupestd/Developing%20Evaluation%20Questions.pdf>
- <https://www.cdc.gov/library/researchguides/evaluationquestions.html>

Types of Evaluation

This tip sheet will help you complete the Evaluation Purpose sections of the **Evaluation Plan** and help you implement Step 3 of the evaluation process.

Types of Program Evaluation

You can conduct different types of evaluations depending on:

-  the questions you are trying to answer,
-  how long the program has been in existence,
-  who is asking the question,
-  and how you will use the information.



Process Evaluation

Process evaluation examines your program activities, operations, implementation, quality, processes, and context. Evaluating your implementation helps you understand the what, how, and who of the program being implemented. This type of evaluation assesses if program activities are being carried out as intended, tracks adaptations, monitors implementation (e.g., reach, dose delivered), and helps you describe the context.

Process evaluation helps determine the causes for successful or poor performance. It will help:

- answer how well the program is doing what it set out to do
- strengthen your ability to report on your program and improve future activities
- provide an early warning for any problems that may occur
- monitor how well their program plans and activities are working
- improve the quality of implementation
- understand the relationship between program context and program processes

Example process evaluation questions:

- To what extent is the program being implemented as designed?
- To what extent is the program accessible and acceptable to its population of focus?
- How well is the program working?
- How can the program be improved?
- To what degree do program processes and implementation fit the program context?
- What are the barriers and facilitators to implementation of program activities?

Outcome Evaluation

Outcome evaluation determines whether your strategies and approaches are achieving the desired results. Outcome evaluation questions are designed to show the value or impact of the program.

Outcome evaluation examines the outcomes in the context of the program. For example:

- For whom does the program work and not work? Why?
- Do the types of outcomes achieved vary across subgroups? Why?
- When it does work, how does it work? When it doesn't work, why?
- What matters about how it is done, in order for it to work?
- What matters about the contexts into which it is introduced in order for it to work?

For more information about how to identify outcomes, download the **Identifying Outcomes** tip sheet.

Example outcome evaluation questions:

- What changes in ... occurred?
- How effective was the program in ...?
- To what extent did ... change for ...?
- To what extent did the program contribute to changes in ...?



Other Types of Evaluation

Policy Evaluation: This type of evaluation examines the content, implementation, or impact of a policy. For information about evaluating injury prevention policies, see NCIPC's Policy Evaluation Briefs

- <https://www.cdc.gov/injury/pdfs/policy/Brief%201-a.pdf> or the CDC Policy Office Page
- <https://www.cdc.gov/policy/analysis/process/docs/UsingEvaluationtoInformCDCsPolicyProcess.pdf>

Economic Evaluation: This type of evaluation identifies, measures, and compares the costs and consequences of different programs. For more information about economic evaluation, see

- <https://www.cdc.gov/policy/polaris/economics/index.html>
- https://www.cdc.gov/asthma/program_eval/asthmaprogramguide_mod6.pdf

Culturally Responsive Evaluation: This type of evaluation involves examining demographic, sociopolitical, and contextual dimensions, locations, perspectives, and other characteristics of a program. Resources exist to foster cultural competence in evaluation and culturally responsive evaluation:

- <https://www.equitableeval.org/resources-pushing-thinking>
- https://www.cdc.gov/dhdsdp/docs/cultural_competence_guide.pdf

General Resources about Types of Evaluation

- <https://www.cdc.gov/std/Program/pupestd/Types%20of%20Evaluation.pdf>



Centers for Disease
Control and Prevention
National Center for Injury
Prevention and Control

Evalu**ACTION**

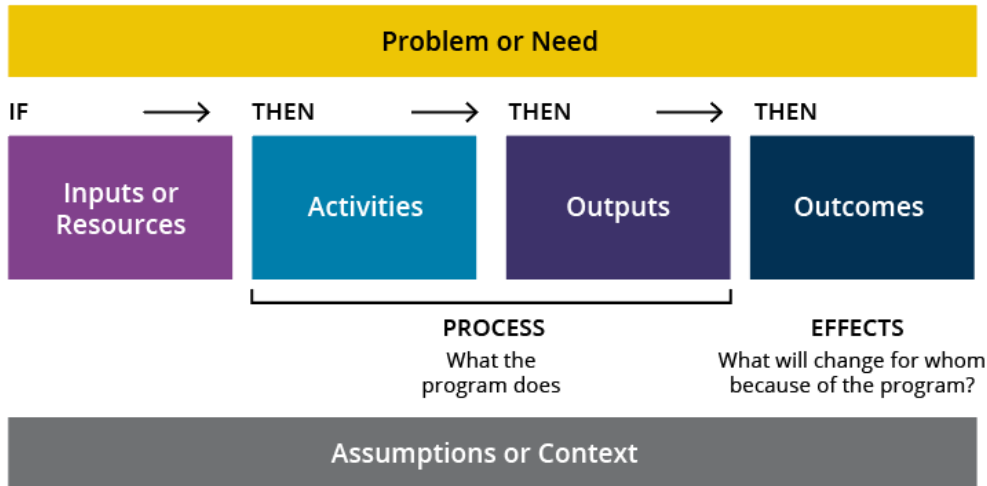


Developing a Logic Model

A logic model is one of many tools to help you describe your program. It is a graphic depiction of the relationship between your program's activities and its intended effects, an implicit 'if-then' relationship of the program elements. This handout will help you develop a logic model, which supplements the Program Description section of the Evaluation Plan and Step 2 of the evaluation process.



Logic Model Components



Component	Description
Problem or need	Logic models may include a problem or need that the program is trying to solve to link the program and outcomes back to its larger purpose and goals.
Inputs	Inputs are the actual or anticipated resources needed to plan and implement the program, both material and intellectual. Inputs are not necessary to include in logic models. However, tracking inputs may help to understand the investments and resources.
Activities	Activities are the actions of the programs—what the program does to create, or contribute, to change.
Outputs	Outputs are the countable products of the activities. They are measures of activities similar to the way indicators are measures of outcomes.
Outcomes	Outcomes are the benefits, results, or changes that you expect to occur during or after your program activities. Outcomes are typically categorized by specific timeframes (e.g., 1–2 years, 3 – 5 years, 5+ years): <ul style="list-style-type: none"> • Short-term: Immediate effects from completing the program • Intermediate or mid-term: Changes seen prior to larger sustainable impacts • Long-term: Sustained group or population-level impacts
Contextual factors or assumptions	Contextual factors or assumptions can help clarify the problem the program aims to address, the suitability of programming in a specific setting, and potential weaknesses in program design. They help understand factors outside the scope or control of program activities that may influence the outcomes. These factors are typically depicted in the margins or outside of the logic model.

How Do You Develop a Logic Model?

There is not one right way to develop a logic model. The goal is to ensure it makes logical sense. You can think about it as an if-then, so that, or chain-reactions sequence. You will provide information about the activities and move to outcomes, using arrows to show the relationships between items.

Logic models are usually one page. One key tip is to find the balance between being detailed enough yet concise enough so that someone who doesn't know your program could get a general understanding of your program.

Engaging your stakeholders can provide diverse perspectives on the program leading to a more holistic picture that includes more distal/long-term outcomes. Their input will help you draw the boundaries of your work within the broader context (e.g., what else may be going on or being implemented in the community).



A logic model template is provided on the following page. Steps to help you move from brainstorming to refining your logic model are provided below. To fill out this PDF, you can type directly into the text fields using a PDF editor or print a copy to complete by hand.

1

Gather existing information you have about the program. Work with stakeholders to identify key program information.

2

Start from activities and move to outcomes (left to right) **OR** start from the end goal and move to activities (right to left).

3

Brainstorm a list of outcomes that your program intends to affect.

4

List your outcomes based on relationships and logical sequence.

5

Fill gaps by relating outcomes back to the problem or need.



Review the **Identifying Outcomes** tip sheet to further refine your logic model outcomes.



Additional Resources

- <https://www.cdc.gov/eval/steps/step2/index.htm>
- <https://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/logic-model-development/main>
- <https://www.wkkf.org/resource-directory/resources/2004/01/logic-model-development-guide>

Worksheet 3: Logic Model

Inputs	Activities	Outputs	Short-term Outcomes	Intermediate Outcomes	Long-term Outcomes	Impact
<i>Resources to implement activities and produce outputs</i>	<i>Activities implemented to produce outputs</i>	<i>Products and services delivered</i>	<i>Immediate results achieved following delivery of output</i>	<i>Results expected to lead to the end outcome</i>	<i>Ultimate desired change as a result of program</i>	<i>Ultimate change desired outside of your full control</i>
 Assumptions, Factors, and Barriers impacting Product/Service Delivery			 Assumptions, Factors, and Barriers impact achievement of outcomes			

Develop your logic model. Fill in the logic model template to identify our processes and outcomes. Consider assumptions, barriers, and other factors or trends impact this work. Start with the right side of the logic model and identify what we are ultimately seeking to achieve and move your way to the left, ensuring that each subsequent column has a logical link. Short, intermediate, and long-term outcomes should all be within our realm of control. Be thoughtful about what you are reasonably seeking to achieve as a result of this project.





Developing Evaluation Indicators

What is an indicator?

It is a marker of accomplishment/progress. It is a specific, observable, and measurable accomplishment or change that shows the progress made toward achieving a specific output or outcome in your logic model or work plan.

Common examples of indicators include: participation rates, attitudes, individual behaviors, incidence and prevalence. The indicators you select should answer your evaluation questions and help you determine whether or not your program objectives have been achieved.

Key Elements	Examples of key elements of an indicator
Specific	<p>Provides a clear description of what you want to measure, i.e.</p> <p>“In-school adolescents aged 13–18 who test positive for Chlamydia”</p> <p>Instead of “youth who have an STD”</p> <p> TIP: See ‘specific’ criterion of SMART objectives from Step 2.2 on pages 51–52 of the manual.</p>
Observable	<p>Focuses on an action or change, i.e.</p> <p>“The proportion of school-clinic staff who can list two risk factors for Chlamydia”</p> <p>Instead of “the proportion of school-clinic staff who can identify the risk factors for Chlamydia”</p>
Measurable	<p>Quantifies change and generally reported in numerical terms, such as counts, percentages, proportions or ratios</p> <p> TIP: See ‘measurable’ criterion of SMART objectives from Step 2.2 on pages 51–52 of the manual.</p>

For more information and examples, see Step 4.1 in the Practical Use of Program Evaluation among STD Programs manual.
<http://www.cdc.gov/std/program/pupestd.htm>

How do you develop appropriate indicators?

1. Involve your program stakeholders in indicator development.

Bring stakeholders together to identify meaningful indicators. This will help ensure the buy-in for your evaluation findings. Consider consulting existing literature and other relevant resources to assist with identifying indicators.

2. Review evaluation questions and use your logic model as a template to develop indicators.

Link *process* indicators to your logic model *outputs*, Link *outcome* indicators to your logic model *outcomes*.



TIP: See the “indicator matrix template” on pages 179 and 182 of the manual.

3. Review indicators to ensure they are specific, observable, and measurable

Example: “The proportion of **gonorrhea cases among women 14–19 years of age interviewed within 7 days from the date of specimen collection**”

Specific: “**gonorrhea cases among women 14–19 years of age**”

Observable: “*interviewed within 7 days from the date of specimen collection*”

Measurable: “proportion of gonorrhea cases”

4. Include baseline data for inputs and outcomes if you are trying to measure change.

For example, increased adherence of clinical staff to STD guidelines from time period 1 to time period 2.

5. Determine whether the indicators:

- Provide useful information that can measure processes and outcomes and answer evaluation questions
- Are feasible in terms of data availability and timely data collection
- Are adequate to capture the information you need. You may need to develop more than one indicator, but avoid creating too many indicators because they can detract from the evaluation’s goals.

Keep in mind, some information that is important to track may not have indicators associated with them. For example, some aspect of the program may be qualitative (e.g. describing the nature of a partnership). Sometimes what is important isn’t always quantifiable.



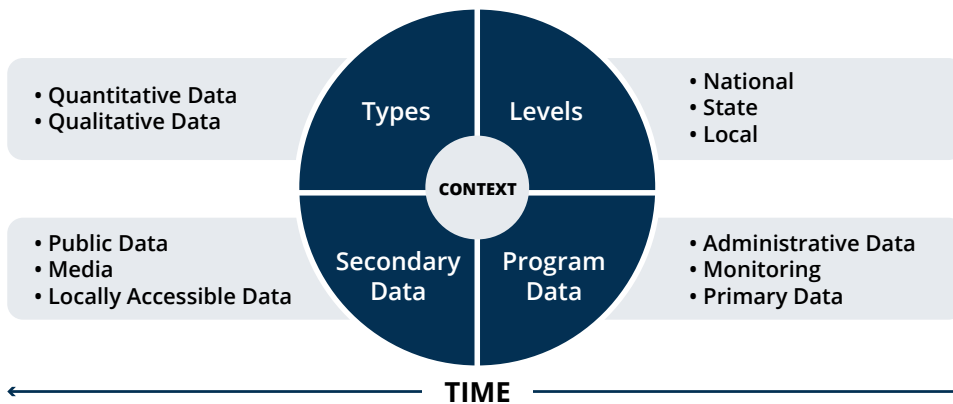
Evaluation Data Sources

This tip sheet will help you complete the Evaluation Design section of the Evaluation Plan and implement step 4 of the evaluation process.

Data Sources

A data source is an entity that provides information that has been systematically collected. Some examples include administrative records, surveillance systems, or surveys.

There are many types and sources of data. One isn't necessarily better than the other, and you can pick and choose indicators, data, and trends that are most relevant for your program and evaluation questions. The table on page three provides a format for brainstorming different data sources that may be appropriate for your evaluation.



Using mixed methods and multiple data sources can strengthen an evaluation and provide a more holistic, complete view of your findings. This is also referred to as the triangulation of data. It will help you explore the “why” behind the “what.” For example, triangulation of data can:

- be used sequentially (one after another) or concurrently (at the same point in time) for different purposes
- demonstrate the linkages of results/outcomes and your prevention efforts
- corroborate and clarify for a more valid and credible understanding especially when you have mixed results
- help you make comparisons and identify trends

Program Data

You may already be collecting monitoring data and administrative data that can be used to understand the implementation.

Examples of existing program data:

- Program reports
- Recruitment information
- Attendance logs
- Performance monitoring
- Meeting minutes

Qualitative and Quantitative Data

Qualitative data will help you understand the why and how, beyond quantifying what and how many. Using a combination of qualitative and quantitative data will help you have a more complete story.

Qualitative Data

- Describes qualities or characteristics
- Narrative form
- Answers how and why
- Data collection methods:
 - Interviews
 - Open-ended survey items
 - Focus groups
 - Direct observation
 - Written documents
 - Photos



Quantitative data

- Continuous or discrete values or compared on a numeric scale
- Answers what and how many
- Data collection methods:
 - Closed-ended survey item
 - Items in interviews or questionnaires that collect numbers or are closed-ended questions
 - Counts
 - Validated scales
 - Objective measures (e.g., height, totals)



Secondary Data

It is important to first consider existing data sources and secondary data (data collected by someone else) before deciding to collect primary data (data you collect yourself). Using secondary data can save resources, time, and effort. It may also assist in assessing trends for community or longer-term outcomes.

Publicly available data are already collected, analyzed, and ready for use. Since these data do not require primary collection and are ready for use, they are more feasible to track, report, and use for evaluation purposes. For information about a variety of risk and protective factors that are available using publicly available data, visit the **SV Indicators Database** (<https://vetoviolence.cdc.gov/apps/sexual-violence-indicators-guide-database/home>).

Another secondary data source is **locally accessible data**, which is attainable through data use agreements (DUA) or memorandums of understanding (MOU).

Examples of publicly available data

- Current Population Survey and other U.S. Census files
- Behavioral Risk Factor Surveillance System (BRFSS)
- Youth Risk Behavior Survey (YRBS)
- Pregnancy Risk Assessment Monitoring System (PRAMS)
- Cancer registries
- State vital statistics
- National Health Interview Survey (NHIS)

Examples of locally accessible data

- Law enforcement data
- Hospital data
- School data
- Legal data

Levels of Data

Examining different levels of data can help you assess patterns, comparisons, and trends that may reveal additional insights otherwise not seen when only examining combined or summed data. Examples include multiple site, local vs. state, or by population type.

Indicators

An **indicator** is a documentable or measurable piece of information (e.g., conditions, outcomes, or results) from a data source, regarding some aspect of the program/strategy being evaluated. Indicators can help operationalize your outcomes and process.

Indicators can help us tell:

- the extent to which program objectives are met
- the progress the program has made
- the extent to which targets are met
- whether a change has occurred

For information about the process of identifying and selecting indicators, visit the **SV Indicators Guide** (<https://vetoviolence.cdc.gov/apps/sexual-violence-indicators-guide-database/home>).

Use a Set of Indicators

One indicator will likely NOT fully answer an evaluation question or tell your whole story. You will need a set of indicators of what you are trying to measure that is changing. Each indicator has strengths and weaknesses; by using a set of indicators, you combine their strengths to balance out their limitations. An indicator is just one piece of the program, the evaluation, and telling the story of change and your work. Consider the following when selecting appropriate indicators:

- The indicator should correspond to your program activities (process) or outcomes.
- There may be more than one indicator for each activity or outcome.
- The indicator must measure one aspect of the activity or outcome.
- The indicator must be clear and specific to what it measures (e.g., it is not ambiguous or not able to be misconstrued).
- The indicator must be feasible to measure or track.
- The data for an indicator must be available at a timepoint or frequency that is appropriate, meaningful, and relevant to your program's current point in its lifecycle.
- The indicator is considered culturally appropriate, relevant, and ethical to your stakeholders.

For a set of worksheets that will help you select and prioritize a set of indicators for your evaluation, view the **Indicator Selection Tools** (<https://vetoviolence.cdc.gov/apps/violence-prevention-practice/sites/vetoviolence.cdc.gov/apps/violence-prevention-practice/files/indicator-selection-tool-508.pdf>).



On the following page, there is a worksheet to help you identify data sources. To fill out this PDF, you can type directly into the text fields using a PDF editor or print a copy to complete by hand.

Identifying Data Sources

Potential Data Source	Potential Indicators from this data source...	Will potentially answer this evaluation question:



Centers for Disease Control and Prevention
National Center for Injury Prevention and Control

Evalu**ACTION**



Program Evaluation Tip Sheet: Constructing Survey Questions

October
2011

This tip sheet is intended for programs funded through the Centers for Disease Control and Prevention's (CDC) Division for Heart Disease and Stroke Prevention. The document offers suggestions on writing the best possible survey questions—it is not intended as a comprehensive guide to survey design or methods.

Introduction:

Surveys can be an important part of your evaluation efforts. Developing questions that accurately assess the opinions, experiences, and behaviors of respondents is a critical aspect of survey methods. Before launching into any survey effort make certain you know the purpose of the survey. To determine this, ask—

Why are you conducting a survey? Is conducting a survey the best way to collect the information you need for your evaluation? Check for existing data sources that may meet your needs.

Who are you surveying? Staff, partners, recipients, employers, providers, etc. You need to know your respondents so that you can use terms and ask questions that are relevant to them.

What do you need to know? You may have a long wish list of things you would like to know—go through your list carefully and determine which ones are “need to know” rather than simply “nice to know;” You can ask yourself: If I know _____ (fill in the blank with the information you hope to gather through the survey), I will be able to _____ (measure a specific outcome, for example). It is important that you take the time upfront to determine if each question you are considering is absolutely essential.

How will the survey be administered (i.e., telephone, in-person, Internet)? Your survey mode may have implications for question wording, type, placement, and survey length.

Common Pitfalls to Avoid When Constructing Your Survey Questions:

Creating well-structured, simply written questions will help collect accurate and meaningful survey responses. The goal is to create survey questions that read well and are easy to answer. While there are no set rules on the wording of survey questions, avoiding some common pitfalls will improve the overall quality of your survey questions. The table below highlights a few of these.

Pitfall	Description	Example	Revision
Doublebarreled questions	Double-barreled items contain two or more things that are being asked in a single question. It is a question that touches upon more than one issue, yet allows for only one answer.	“Do you have high blood pressure and high cholesterol?”	Separate into two questions: 1. “Do you have high blood pressure?” 2. “Do you have high cholesterol?”
Introducing bias	Leading items introduce bias and may influence the way a respondent answers a question. Also, check to make sure that a previous question does not influence how a respondent answers a later question.	“Exercising every day is important—do you exercise every day?” <input type="checkbox"/> Always <input type="checkbox"/> Sometimes <input type="checkbox"/> Never	“Do you exercise every day?” <input type="checkbox"/> Always <input type="checkbox"/> Sometimes <input type="checkbox"/> Never
Balanced question and response	Not including an adequate range of response categories may require respondents to choose answers that do not accurately reflect their experiences or may cause respondents to be frustrated and skip the question.	“In a typical year, how often do you visit your doctor?” <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly	“In a typical year, how often do you visit your doctor?” <input type="checkbox"/> Once per week <input type="checkbox"/> One time each month <input type="checkbox"/> Two times each year <input type="checkbox"/> One time each year <input type="checkbox"/> Never
Negative items	Answering negative questions can be confusing to your respondents.	“Do you typically not eat vegetables every day?” <input type="checkbox"/> Always <input type="checkbox"/> Sometimes <input type="checkbox"/> Never	“Do you typically eat vegetables every day?” <input type="checkbox"/> Always <input type="checkbox"/> Sometimes <input type="checkbox"/> Never

Please Note: These hypothetical survey questions are only intended to illustrate the pitfalls. There is no expectation that these should be adopted for use.



Question Types:

Your survey questions can have several different structures that range from close-ended to open-ended. A few of the most common styles are summarized below.

Close-Ended Questions: Response categories are provided.

Close-Ended with Ordered Choices

- The response categories are in a specific order.
- Rating scales are popular ways of collecting information if you want to measure a person's opinions, knowledge, or feelings.
- Note: In some cases, it may be a good idea to not include a neutral point, such as "Neither disagree nor agree." However, it may be important to include a "neutral" option for a particularly sensitive question. Knowing your respondents will help you decide which way to proceed.

Example: "Do you disagree or agree with the following statement: Our community needs more sidewalks?" (select only one)

- Strongly disagree
- Disagree
- Neither disagree nor agree
- Agree
- Strongly agree

Close-Ended with Unordered Choices

- The response categories are in no particular order.
- Note: Provide instructions so your respondents know how many answers to check. If you want only one answer, then note "select only one."

Example: "What type of physical activity or exercise do you do each week?" (select all that apply)

- Walk
- Run
- Yoga
- Bicycle
- Swim
- None of the above

Partially Close-Ended

- A slight variation to the close-ended question is to include the "other, please specify" category, which allows respondents to add their own answer.

Example: "What type of physical activity or exercise do you do each week?" (select all that apply)

- Walk
- Run
- Yoga
- Bicycle
- Swim
- Other: (Please specify) _____

Open-Ended Questions: Response categories are not provided.

- Open-ended questions do not provide choices from which to select an answer. Instead respondents write an answer in their own words.

Example: In your opinion, what steps or action can you take to improve your physical health? (write in your answer)

Importance of Pilot Testing:

When you have drafted your questions, identify people who are similar to your intended survey respondents and ask them to complete the questionnaire to help you determine if—

⚡ **Words and terms are clear.**

⚡ **Response categories are adequate.**

⚡ **Format and layout are easy to follow.**

⚡ **Language is culturally appropriate.**

⚡ **Flow of questions is logical.**

⚡ **Skip patterns make sense.**

⚡ **Mechanics of survey administration are feasible.**

⚡ **Length of time to complete is reasonable.**

Review the results of your pilot test and determine how you will refine your survey questions. If you have made major revisions based on your pilot, you may need to pilot test your survey again.

Remember:

Careful planning at the start of your survey development will help you create accurate measures and improve data quality that will contribute to your evaluation efforts. To learn more about this topic, please contact your CDC evaluation consultant or project officer.

Resources:

⚡ <http://www.aapor.org/Education-Resources/For-Researchers/Poll-Survey-FAQ/Question-Wording.aspx>

⚡ <http://ropercenter.cornell.edu/support/interpretive-analysis-questionnaire-design/>

⚡ http://www.whitehouse.gov/sites/default/files/omb/inforeg/statpolicy/standards_stat_surveys.pdf

⚡ To learn about concepts such as validity, reliability, and when to use specific survey methods such as telephone, inperson, Internet: <http://www.socialresearchmethods.net/kb/survey.php>



Creating Accessible Printed Resources: Tips and Tools

August 2023

Introduction

Navigating homeless and housing services often requires a lot of reading and paperwork. However, people experiencing homelessness may present with lower reading levels or disabilities that impact their ability to easily read and comprehend written information. Homeless services organizations should ensure their written materials are accessible and readable to those using their services. This guide provides an overview of tips and tools that programs and staff can use to make sure printed information is readable and accessible. This information can be used to develop any written material, including intake forms, written paperwork, informational hand-outs, and signage (among others).

This resource is a quick guide that covers formatting, writing style, and additional strategies to support people in being able to read and understand written materials. If organizations are interested in learning more about literacy and accessibility, please see the following recommended resources:

[Health Literacy Universal Precautions Toolkit: Assess, Select, and Create Easy-to-Understand Materials](#) [Agency for Healthcare Research and Quality]

[Creating Accessible Documents](#) [AbilityNet]

[ADA Requirements: Effective Communication](#) [[ADA Technical Assistance](#)]

Format

Formatting is what the document looks like. Formatting can make a big difference in how readable a document is. The following are recommended when formatting your documents:

- Make sure there is white space and avoid having too much text close together. Using spacing between sentences or directions.
- Use headers to separate sections of the document. Headers should be larger than the rest of the text.
- Make sure to use a font that is easily readable. Typically, a “sans serif” font works best. Avoid using a light or thin font.
- The font size should be a minimum of 12. 16-point font is recommended for people with low vision. It might be helpful to have a “large print” version of handouts or paperwork that can be used when needed.
 - You should offer both options and allow the person to select. You don’t want to assume which version the person needs or prefers.
- Use “left” alignment. This makes it easier for the person to find the start and end of each line.
- If using color, make sure that there is a high contrast between the color and text used. Color can also be used to group text into sections or create sections in a document.
- Use lowercase letters and avoid using ALL CAPS when possible. This include avoiding a font that uses ALL CAPS (e.g., Copperplate).
- Use graphics/pictures that help convey the most important information in the section. Make sure the text in the graphic is legible.

Writing Style and Language

Writing style and language are focused on the content and how the written information is presented. Writing style and language are the key to making written information and documents accessible to a variety of readers and audiences. The following are recommended when writing your documents:

- Information that is given to service users should be written at a 6th – 8th grade reading level.
 - To check the reading level of your document, use the Review feature in Microsoft word, depicted below.
- Use short sentences. Try to keep sentences between 15 and 20 words.
- Do not include more than three instructions or pieces of information in one sentence. Instead, break the sentence into smaller shorter sentences.
- Use bullet points to create lists and break complicated information into simpler instructions. Bullets or numbering can be especially helpful to create a list of steps for someone to follow.
- Avoid using acronyms as much as possible. If used, the explanation of the acronyms should be available in the document.
- Use the “active voice.” Active voice sentence structure is the “Subject – verb – object.” An example of this is “The doctor prescribes your medication.”
 - Avoid passive voice as much as possible. An example of passive voice is “Your medication will be prescribed by the doctor.”
 - The Review tool in Microsoft word can identify the passive sentences.
- Offer hand-outs in languages other than English. This will require you to identify other languages that might be used by the community that you serve.
 - It is important to use a verified translator and have someone fluent in the language review the document. Try to avoid using Google translate as there are often errors in AI translations.

The end of this document provides an overview of the steps to use the Microsoft Word features to check readability of your documents.

Additional Strategies

Ideally, the formatting and writing style suggestions of this document will be used across all printed materials. However, providers and staff may also work with people to complete paperwork or read information from other sources that have not implemented accessibility strategies. In those cases, additional strategies can be used to support the person in reading and understanding written information.

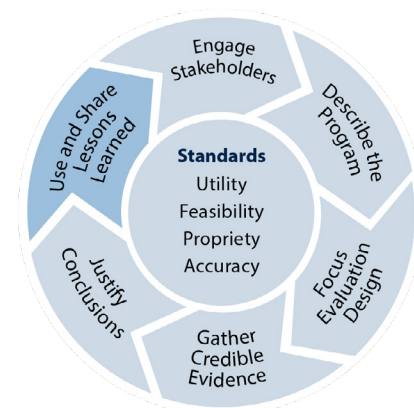
Additional ways to support people in being able to easily read and use printed resources include:

- Have reading glasses available to borrow. Many people experiencing homelessness don't have access to eye doctors or glasses.
- Use a blank piece of paper to cover up part of the page while working. This can decrease visual overload, and help the person focus on each section one at a time. If needed, the person can read the form or information line by line, with the blank paper moving with the person as they read.
- Highlight important information. This should be focused on the most important thing you want the person to read, remember, or follow.
- Provide quiet spaces for people to read and review information.
- Make sure that the person has extra time to read if needed or provide the written information ahead of time so they can read and review in advance.
- Check comprehension by asking the person to describe the information in their own words. Avoid using "yes" or "no" questions, as this might not tell you what the person has understood.
- Make sure that any corrections are provided gently, so as not to embarrass the person.
- Manage your own frustrations if the person is taking a long time to read or understand, otherwise this might make them less likely to ask for help in the future.

Effectively Sharing Evaluation Findings

This tip sheet will help you complete the **Translation, Communications, and Dissemination** section of the Evaluation Plan and Step 6 of the evaluation process.

It is important to plan for translating, communicating, and disseminating your evaluation findings to inform and help your stakeholders and intended audiences use them in a timely fashion to improve, sustain, or make other decisions about the program.



Define Your Audience

When ensuring use and sharing lessons learned, start with defining your key audiences and their needs, interests, and preferences. This may involve talking directly to them, reviewing the information you gathered from Step 1, and doing the following:

- identifying the appropriate, preferred, and commonly used communication channels for your audience
- understanding their values, roles, and needs
- asking for formats or features of products that appeal to them
- discovering their motivations, attitudes, and beliefs related to your topic of interest and project
- acknowledging what is within their sphere of influence
- considering their technical expertise and experience



Use the guiding questions in the **Key Audience, Needs, and Preferences** columns of the Translation Plan table on the last page of this document to help you define your audience. To fill out this PDF, you can type directly into the text fields using a PDF editor or print a copy to complete by hand.

Translate Findings

Next, identify what you want the audience to take away and do with certain information. Remember, evaluation results may not always be expected or favorable but consider how they can still be useful.

Use the remaining columns of your worksheet to plan and develop appropriate products:



identify the key messages that will help you achieve your goal for use and action



tailor the language and format considering the key audience's expertise and preferences, ensuring that reports are culturally appropriate



plan ahead for how and when you will be developing and disseminating the product

Creating Compelling Communications Products

Results can be shared in many forms depending on the audience and setting. Choose a format that ensures the findings are used by the stakeholders. It is likely that multiple formats will be used for one or more audiences.

The following chart describes several communication formats, but this is not an exhaustive list:

Format	Description
Evaluation Summary	Overview of evaluation processes, evaluation questions, and key findings/takeaways
Presentation	A demonstration or speech that highlights the high-level results as relevant for specific stakeholders or to the public health field leading to the discussion of recommendations or stakeholder questions; could be completed in-person or electronically
Newsletter or Press Release	A short publication that provides an update/overview and highlights key findings for a particular audience; could also include a blog post or podcast discussion
One-Pager	One or two-page report including context for program and evaluation and key findings; should be very visual and provide audiences with a high-level view on key take-aways or recommendations
Success Story	Anecdotal or qualitative evidence of a program's success or function; can be presented or embedded in other formats described above
Dashboard	A customized graphical report that is brief and visually appealing; usually accessed digitally and dynamic so that it can be adjusted and shows change over time

Regardless of the format you choose, data visualization can make reporting evaluation findings more efficient, interesting, and digestible. Effective visualization helps audiences understand the information. For example:

- **Use charts** to effectively display data comparisons, data magnitude, or changes in data over time.
- **Use icons or other picture visualizations** to help viewers intake information in a way that is impactful, organized, and easy to digest.
- **Create balanced visual interest** to draw the eye in but keep focus on the most important details. Avoid creating design elements that bring too much attention (i.e., unnecessary call-out boxes or color blocking). Check that all visual interest elements add meaning, rather than just interest.
- **Use dashboards** as a dynamic resource that can be used online. Users with access to Microsoft Office 365 can use Power BI and access free guided learning online. Tableau public is also free to anyone and tutorials can be found online. These resources can help users produce various charts and visualizations, including geographic mapping.



Additional Resources

- *Introduction to Program Evaluation for Public Health Programs: A Self-Study Guide, Step 6: Ensure Use of Evaluation Findings and Share Lessons Learned*, Program Performance and Evaluation Office, Centers for Disease Control and Prevention <https://www.cdc.gov/eval/guide/step6/index.htm>
- *Disseminating Program Achievements and Evaluation Findings to Garner Support*, Division of STD Prevention, Centers for Disease Control and Prevention <https://www.cdc.gov/healthyouth/evaluation/pdf/brief9.pdf>
- *Evaluation Reporting: A Guide to Help Ensure Use of Evaluation Findings*, Division for Heart Disease and Stroke Prevention, Centers for Disease Control and Prevention https://www.cdc.gov/dhds/docs/Evaluation_Reporting_Guide.pdf
- CDC Gateway to Health Information <https://www.cdc.gov/healthcommunication/index.html>
- Data Visualization Resources <https://guides.library.duke.edu/c.php?g=289678&p=1930713>

Translation Plan

Key Audience	Needs	Preferences	Intended Use of Action	Key Messages and Principles
<p><i>Who is the key audience?</i></p>	<p><i>What do they want? What will they want to be able to do? Why?</i></p> <p><i>What is their current knowledge, attitudes, beliefs, and behaviors?</i></p>	<p><i>What are their preferences for receiving information?</i></p> <p><i>What is important to them?</i></p> <p><i>Who does the key audience view as a credible messenger?</i></p>	<p><i>What do you want to be able to influence or address with them?</i></p> <p><i>How do you want the key audience to use the information?</i></p>	<p><i>What is the key message you want the key audience to walk away with?</i></p> <p><i>How will the information be shared with the key audience? In what format? When will this be shared?</i></p> <p><i>What is the best format, method, and timing to ensure timely use, action, or decision making?</i></p> <p><i>Who needs to be involved in advancing use and diffusion?</i></p>



Centers for Disease Control and Prevention
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Evalu **ACTION**



Quick-Start Guide to Dissemination for Practice-Based Research Networks

Overview

This document briefly describes the dissemination planning and implementation process. It contains links to resources that guide you through the phases of dissemination.

Introduction

Dissemination refers to the process of sharing research findings with stakeholders and wider audiences. Dissemination is essential for uptake, and uptake and use of research findings is crucial for the success and sustainability of practice-based research networks (PBRNs) in the long term.

Dissemination Planning

To ensure that the project results will be used, research projects must develop a dissemination plan that explains how the outcomes of the project will be shared with stakeholders, relevant institutions, organizations, and individuals. Specifically, a dissemination plan explains:

- Why—the purpose of dissemination
- What—the message to be disseminated
- To whom—the audience
- How—the method
- When—the timing

Ideally, the dissemination plan will link with a broader dissemination strategy for the overall program that encompasses the research project. It should be planned in consultation with the project partners and approved by the project management committee.

Stakeholder Analysis

The dissemination strategy should be based on an understanding of stakeholders and their information needs and preferences. A stakeholder is anyone who has a vested interest in the project or will be affected by its outcomes. Stakeholder analysis is an exercise in which stakeholders are identified, listed, and assessed in terms of their interest in the project and importance for its success and further dissemination. Key stakeholders for practice-based research networks include other PBRNs, primary care physicians and providers, the primary care research community, policymakers, and patients.



Key Elements of a Dissemination Plan

A dissemination plan must address: the purpose of the outreach, the audience for the outreach, the message or messages to be shared, the methods for sharing the messages, the timing for the outreach, and the process for evaluating the success of the dissemination effort.

Purpose

All dissemination should have a purpose and should support or inform project development in some way. The purpose of the activity may be to:

- Raise awareness—let others know what you are doing
- Inform—educate the community
- Engage—get input/feedback from the community
- Promote—‘sell’ your outputs and results

Defining the purpose of dissemination is a first step to decide on the audience, message, method, and timing of the dissemination.

Audience

The dissemination process depends on whom you want to reach and what they can do for your project. Therefore, the different individuals, groups, and organizations that will be interested in the project and its results need to be identified and informed. Develop the audience based on the results of the stakeholder analysis. The following audiences may be considered:

Internal Audiences

Keep members of the project consortium and your own institution well informed about the progress of the project. Adequate internal dissemination can also ensure that the project has a high profile within your PBRN.

Other PBRNs

Share project results with coordinators and key actors of projects dealing with similar topics, both within the program and in others, to ensure visibility and uptake of results, and provide opportunities to receive feedback, share experiences, and discuss joint problems and issues.

External Stakeholders

Reach out to people who will benefit from the outcomes of the project, as well as “opinion makers” such as teachers, researchers, librarians, and journalists, who can act as catalysts for the dissemination process. Share findings that can be used by a wider audience than the specific target group through newsletter articles, conference presentations, case studies, etc.



Message

Once the purpose and audience of the dissemination are clear, define the key messages. To that end, keep these communication principles in mind:

Messages Should Be Clear

Messages should be clear, simple, and easy to understand. Use language appropriate for the target audience, and use non-technical language where possible.

Messages Should Be Targeted

Tailor messages to the receiver(s). Carefully consider what they should know about the project. It is possible to send the same message to different audiences, but check the relevance of the message to the receiver each time.

Messages Should Be Actionable

After hearing the message, the target audience should understand what action(s) to take.

Messages May Be Repeated

Enhance impact by coordinating messages of different projects related to the same subject. Repeating key messages over time reinforces the messages with the target audiences.

Messages Should Be Factually Correct

Use plain language, and ensure that information is correct and realistic.

Methods

While there are a wide variety of dissemination methods, it is important to select the right one(s) to get your message to the target audience and achieve your purpose.

- Newsletters, flyers, and press releases can create awareness about the project.
- Reports, journal articles, and Web sites can transmit information about the project.
- Conference presentations and Web sites are ways to promote the project and its outcomes.

In addition to more traditional dissemination methods, it can be useful to use less typical strategies. For example, workshops or online discussion lists can yield a higher level of engagement from stakeholders. This may be particularly relevant for conflicting information or information that is likely to meet resistance.



Timing

When planning the dissemination, decide when different dissemination activities will be most relevant. The ideal timing will depend on the progress of the project as well as on the agenda of the target audience. For instance, at the start of the project, focus on raising awareness; at the end, on highlighting the achievements and deliverables. In terms of the “receivers” agenda, consider the time commitments of the target audience and stakeholders. For instance, acknowledge school or bank holidays, and when working with universities, remember that it will be difficult to reach academic staff at the start of the term or during examinations.

Evaluation of the Dissemination

Like all other elements of a project, dissemination activities are met with varying degrees of success. To determine if a dissemination strategy was well chosen and executed, build an evaluation component into dissemination activities to see if they have achieved their aims. For example, measure the success of a Web site by checking the usage logs; evaluate training sessions by asking participants to complete an evaluation questionnaire; and evaluate publications by the number of citations.

Resources

For more information on PBRN Dissemination, select the following links:

AHRQ Publishing Guidelines (Includes information on grant funded video production)

<http://www.ahrq.gov/research/publications/pubcomguide/index.html>

AHRQ Social Media Guidelines <http://www.ahrq.gov/research/publications/pubcomguide/pcguide4.html>

CDC Resources on Health Communication and Social Marketing <http://www.cdc.gov/socialmedia/>

Overview of Dissemination Methods

http://ec.europa.eu/eahc/documents/management/fact_sheet/Factsheet_6_Elaborating_dissemination_plan_OVEVIEW_OF_DISSEMINATION_METHODS.pdf

Basic Template for Dissemination Planning

http://ec.europa.eu/eahc/documents/management/fact_sheet/Factsheet_6_Elaborating_dissemination_plan_TEMPLATE_FOR_DISSEMINATION_PLANNING.pdf

Using Social Media for Dissemination

<http://network.socialmedia.mayoclinic.org/mccsm/>



For more information about the AHRQ PBRN Resource Center, please visit pbrn.ahrq.gov or email PBRN@abtassoc.com

