



How to evaluate in simple steps

Research network workshop
Friday 13th September 2024



Discussion:

Creating a positive 'thinking environment'



10 mins

Start on a positive

- Introduce yourself, state your role and share something that happened this week that was positive (professionally or personally).

Introduction to Optum UK & EMIS



NHS Integrated Care

Clinical software systems serving primary, acute and community care. Electronic patient records, and A&E solutions supporting customers across the NHS. PHM analytics & advisory services.

Primary & Community Care

#1 in primary care electronic patient records with 58% market share and #2 in primary care medicines optimisation

#2 in community care with 19% market share

Acute Care

#1 in A&E acute care with 20% market share (urgent care patient management system)



Pharmacy

Clinical software for pharmacy, providing patient medical records. Enabling the UK government's Pharmacy First initiative to move some front-line care delivery into community pharmacy.

Community Pharmacy

#1 in community pharmacy patient medical record systems with 46% market share

#1 in pharmacy services delivery technology with 95% market share (PharmOutcomes)

Acute Pharmacy

#2 in acute hospital pharmacy with 34% market share



Research & Life Sciences

New EMIS solutions launched in 2023 supporting clinical trial recruitment and targeted interventions. Reviewing synergies with Optum Life Sciences.

Research & Life Science

Product — EMIS Recruit

Joint venture with the University of Oxford to deliver end to end community trials

Product — EMIS Pathway

Successful pilots with NHSE on Hep C eradication. Opportunity across pharma and public healthcare

Interoperability & Analytics

220 proprietary, partner and reseller products

Housekeeping

- We are not expecting a fire alarm
- There will be food
- There will be the sharing of knowledge and experience
- This is an informal environment

Introducing the two workshops

Friday 13th September 10-1pm, St George's

How to evaluate in simple steps

An interactive workshop to introduce a straightforward and practical approach to evaluating your intervention.

Monday 7th October 1-4pm, Fusebox, Kingston

Measuring outcomes and proving impact

An interactive workshop that will focus on some of the techniques for measuring financial and social value through evaluation.

Agenda

Time	Item	Lead
10am	Introduction and welcome	Marcus Green
10.15am	Why evaluate	Marcus Green
10.25am	Key evaluation steps <ul style="list-style-type: none">• Evaluation questions• Data and measurement• Designing your evaluation• Analysing data	Marcus Green
11.15am	Break	
11.30am	Questions, troubleshooting and a group task <ul style="list-style-type: none">• Discussion in the round and a group task focused on a community gardening project	Marcus Green and Evaluation Ambassadors
11:55am	Conclusions and close	Marcus Green
12pm	Lunch and networking	All

Why evaluate?

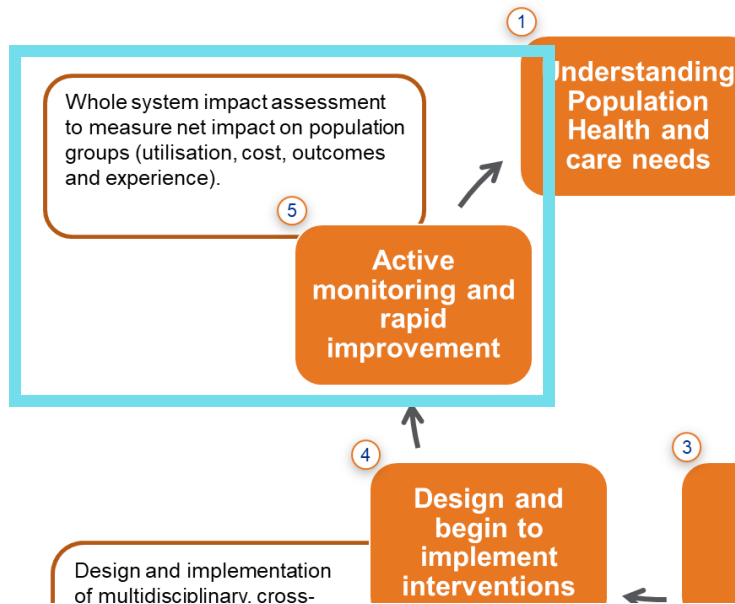
“

“Actions without intelligence is a form of insanity, but intelligence without action is the greatest form of stupidity in the world.”

Charles F. Kettering

Why evaluate?

Evaluation closes the loop



How will you know?

- How will you know... if you are having a positive impact on your population?
- How will you know... whether you should continue with your intervention, or if others should consider adopting it?
- How will you know... that we are providing good value for the time it has taken to deliver?
- How will you know... what to do differently next time?
- **How will you be able to evidence the great work that you are all doing?!**

Evaluation in the real world

Best practice

- Qualitative and quantitative data available
- 12+ months of baseline data, participants inducted at same time
- Experience & outcomes data as well as activity / economic measures
- Randomised Control Trial (RCT) or control groups available

Real world

- Limited data availability
- Baseline data unavailable
- Participants inducted based on clinical or impactability criteria rather than using RCT approach
- Participants inducted when available rather than at same time
- Many other limitations and considerations

Key evaluation steps

Evaluation journey



Evaluation questions

- Set out the key questions you need answering that you can use to evaluate your intervention



Designing evaluation

- Design your evaluation such that it answers your evaluation questions



Analysing data

- Analyse data to evaluate the impact of your intervention



Data and measurement

- Decide your measures and what data to collect
- Do this alongside designing your intervention



Resourcing evaluation and managing stakeholders

- Engage, support and communicate expectations with all stakeholders needed for resourcing evaluation (i.e., in terms of data recording, data collection and data management)
- Align on timeframe for realising outcomes



Sharing findings with audience

- Share intervention findings from your data analytics in appropriate format for each group of stakeholders

Evaluation questions

Thinking through the evaluation questions you are trying to answer

Looking at an example:

'Felix PCN are looking at 230 patients with obesity. This cohort of patients will be given lifestyle advice via a health coach, with the aim that they are empowered to improve their health by changing their lifestyle habits, e.g., increased physical activity levels, eating healthier foods'...

Questions we might ask:

Programme effectiveness

- Is the intervention effective in supporting people to increase their levels of physical activity?
- Is the intervention effective in supporting people to eat more healthily?
- What are the critical success elements of the intervention?

Participants

- Why do participants change their behaviour?
- Why do some participants not change their behaviour/sustain positive behaviour change?
- Are factors that are internal to the individual relevant in whether the individual changes and sustains more positive health behaviour?

Discussion: evaluation questions



Please raise your hand to discuss:

- Think of an evaluation you have done in the past – what were you trying to find out through your evaluation?
- Did you have a hypothesis you were trying to test?
- What were some of the evaluation questions you were trying to answer?

Data and measurement

Data essentials checklist

- ✓ If you want to evaluate an intervention, data is essential
- ✓ It is important that all stakeholders understand this from the very outset of your intervention
- ✓ If data is not recorded or is unobtainable, a robust evaluation will be more challenging
- ✓ Meet with key data and analytics leads before projects begin to get foundations in place
- ✓ Ensure those delivering the intervention have a mechanism for recording the intervention and coding individuals who receive the intervention

The “What” and the “Why” of the logic model

Where are you going? • How will you get there? • What will tell you that you have arrived?

The simplest form of a logic model:



Inputs: What is invested in the program (e.g., money, people, time, and space)

Outputs: What is done in the program (e.g., program activities) and the direct products that result from those activities

Outcomes: What results from the program (i.e., short- and long-term outcomes) measure what impacts, benefits, or changes result from the outputs and can be measured in changes in knowledge (e.g., pre- and post program surveys), attitude, skill, and behaviour (e.g., reduction in risk behaviours).

Can answer the following question: what difference did it make?

Make sure your metrics are SMART

S

Specific

What do I want to accomplish?

M

Measurable

How will I know when it is accomplished?

A

Achievable

How can the goal be accomplished?

R

Relevant

Is this relevant to my overarching aim?

T

Timebound

When can I accomplish this goal?

Discussion: data and measurement

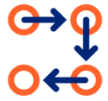


Please raise your hand to discuss:

- What has your experience been of measuring outcomes for an evaluation?
- What challenges have you faced?

Designing your evaluation

Evaluation design



Pre-experimental design

- A prospective evaluation where data is collected and analysed, starting before the intervention is implemented (baseline) through to follow-up
- **Example: assessing the stress levels of participants before and after a mindfulness meditation programme**



Retrospective evaluation without a comparison group

- A backwards look at whether the intended outcomes of the intervention were achieved
- **Example: review records and survey data from a previously implemented community outreach programme**



Quasi-experimental design

- An evaluation that compares outcomes for your participants with a suitable non-randomised control group that you choose (before, during or after your study)
- **Example: measuring patient activation levels pre and post a health coach intervention for an intervention and control cohort**



Experimental design

- Experimental evaluation (such as a randomised controlled trial) involves random allocation of individuals to the intervention or the control group
- **Example: individuals with dementia are randomised between a music therapy group and an art therapy group to study the effect on lucidity**

Discussion: designing your evaluation



Please raise your hand to discuss:

- Have you used any of these evaluation designs before?
 - Pre-experimental design
 - Retrospective evaluation without a comparison group
 - Quasi-experimental design
 - Experimental design

Analysing data

Quantitative analysis

Cost-benefit analysis

- Compares the costs of a project or action to the benefits it provides - if the benefits outweigh the costs, the project is considered a good investment
- **Example: a smoking cessation service costs £250,000 and saves the NHS £750,000 in healthcare costs. The return on investment is 3 (=£750,000/£250,000).**

Before and after differences

- Measures the changes that happened before and after a project or intervention.
- **Example: an individual's BMI decreases from 28.6 months before to 23.6 months after a health and wellness intervention**

Between groups differences

- Measures how big the difference or change is between the intervention cohort and the control group
- **Example: following a wellness coach intervention, average wellbeing score increased by 2.4 points for the intervention cohort compared to the control group which decreased by 0.2 points**

Qualitative analysis

Thematic analysis

- A method of identifying and analysing common themes or patterns within qualitative data, such as from interviews or written responses.
- **Example: analysis of interview transcripts and identifying themes to understand why some intervention participants sustained physical activity changes and others lapsed following a health coach intervention**

Observation methods

- Involves watching and recording people's behaviours or interactions in natural settings to understand their actions and experiences.
- **Example: observing and taking notes during a social connectedness intervention to understand how people in later life make new connections during a weekly coffee morning**

Ethnographic studies

- A detailed study of people and their cultures by immersing in their environment, often for an extended period.
- It aims to understand everyday practices, beliefs, and social interactions from the perspective of the people being studied.
- **Example: collecting and analysing data over an extended period on how residents in a deprived area access local community services**

Discussion: analysing data



Please raise your hand to discuss:

- What techniques have you used to analyse data in the past?

Accessing the Evaluation Toolkit

How to access the Evaluation Toolkit

- Simply visit - <https://info.optum.co.uk/evaluation-toolkit>
- The landing page describes what the Toolkit is and its purpose
- There is a form to fill in before you can access the Toolkit
- The Evaluation Toolkit is for partners across South West London to access. Please do not share more widely as this has been purpose-built for South West London

Interactive evaluation toolkit

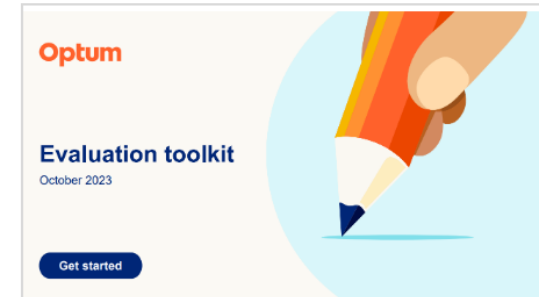
The Toolkit has been created to help you to plan and design evaluation of a service or intervention. It was not designed to support activities like identification of improvement opportunities or service/intervention planning, design and implementation. The Toolkit might be particularly useful for people involved in service evaluation including community and voluntary sector staff, frontline health and care professionals, analysts, commissioners and managers.

The toolkit is designed to be interactive and is made up of sections that describe aspects of evaluation and questions you might need to think about to complete your evaluation.

This has been developed for partners across South West London ICS and should not be shared more widely.

Complete the form to access the toolkit.

Scan QR code to access



Complete the form to access the toolkit

Title*	<input type="text"/>
First Name*	<input type="text"/>
Last Name*	<input type="text"/>
Job Title*	<input type="text"/>
Organisation*	<input type="text"/>
Email Address	<input type="text"/>
Country*	<input type="text" value="United Kingdom (UK)"/>

If you are happy to be contacted as part of the wider South West London evaluation of Health Inequalities projects please provide your email in the form above.

Discussion and group task

Group discussion



Please raise your hand to discuss:

- What are the challenges you are facing in trying to evaluate?
- What successes have you had that you would like to share?
- Anything else you would like to raise given the content covered today?

Group task: designing evaluation for community gardening project



Scenario

You're managing the evaluation for a **community gardening project**.

In this project, local residents are invited to participate in gardening activities at a nearby park.

The project aims to improve physical health, mental wellbeing, and community connections by encouraging people to spend time outdoors, learn about gardening, and work with others in their neighborhood.

Details

Available resources

- Access to the project team (who designed the gardening project).
- Support from the local council for data on park usage and community health.
- Feedback from participants via surveys or interviews.
- Access to health data from local health services (with consent).

Stakeholders

- The project team (running the gardening initiative).
- Local residents (participating in the program).
- Local council (who might continue funding the project).



Please work in groups to produce a high-level evaluation plan for this gardening project. Consider the following questions:

1. What should we measure? (e.g., physical health, mental wellbeing, community connections).
2. How will we know if the project is successful? (e.g., through surveys, feedback, or local health data).
3. Why are improvements happening (if any)? What might explain the changes in wellbeing or health?

Evaluation plan template

1 Evaluation questions

Insert the questions your evaluation is aiming to answer

2 Data and measurement

Insert your outcomes and measures

3 Evaluation design

Insert your type of evaluation design

5 Data analysis

Insert what data analysis you will conduct on your data to evidence impact

Please share your feedback with us!



Thank you for attending today's workshop. Please follow the link below or **scan the QR code** to provide your feedback.

<https://forms.office.com/e/6jTAjjxHB6>

Share Your Experience and Help Us
Make Our Events Even More
Awesome!

