compassionate communities

Evaluation Guide

Version year: 2023

Welcome Compassionate Community Champion!

On behalf of Pallium Canada, the BC Centre for Palliative Care, and Hospice Palliative Care Ontario, we would like to thank you for your work and dedication to improving the experience and well-being of individuals who are dealing with a serious health challenge, and those who are caregiving, dying or grieving.

Compassionate Community initiatives — like the work you are leading — have shown promise in Australia, the United Kingdom and Europe, where evaluation has demonstrated significant successes. In recent years, numerous Compassionate Community initiatives have emerged in Canada, but many have not been evaluated.

A three-year pan-Canadian partnership resulted in the development of this ready-to-use Guide to support the evaluation of Compassionate Communities' initiatives in Canada.

This Evaluation Guide has been designed to help you evaluate an individual activity, a project, or a program within your Compassionate Community initiative. Specifically, this guide will support the designing of your evaluation plan and data collection.

Additional benefits from using this Guide: Using this guide will help promote a common language among compassionate community champions and peers across Canada. A consistent vocabulary will help Compassionate Communities champions improve their ability to learn from each other and share results in a meaningful way. Another benefit is that it promotes the use of common evaluation questions and evaluation measures across Compassionate Communities in Canada. While no two initiatives are exactly the same, there are often similar questions and measures that can help Compassionate Communities learn about how they're doing and where they're going.

Here are 3 key things to keep in mind as you use this guide:

1. Create an evaluation plan that matches the resources you have – this means if you don't have many resources to evaluate, still evaluate but keep it simple. For example, make sure to attend your events and collect post-event feedback.

2. Make sure the data you're collecting will be used – only capture the data that you know is of interest to the community, stakeholders, funders and will support the growth of your initiative.

3. Your plan doesn't need to be perfect – your evaluation plan will change as your initiative changes. Therefore, don't get stuck on creating one final plan because you can revisit and adapt the plan throughout the life of your initiative.

Help us promote and improve the Guide!

We encourage you to help us spread the word about this guide so we can ensure as many community champions as possible have access to it.

As this is the first version of the Evaluation Guide, we would like to ask for your help by providing us with your feedback. Your feedback will help us make practical adjustments to the guide to ensure it's meeting the needs of community champions like yourself. Please take a few minutes to complete our short **feedback survey**.

We look forward to your feedback and engaging with you on your evaluation journey. We would like to note that the next version of the guide will be available in French.

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CITATION

Pallium Canada, **BC Centre for Palliative Care** and **Hospice Palliative Care Ontario**. (2023). Evaluation Guide for Compassionate Communities. Canada

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Acknowledgements

From coast to coast to coast, we acknowledge that we live and work on the traditional, ancestral and unceded territory of all the Inuit, Métis, and First Nations people that call this land home. As health organizations, we are committed to reconciliation and undoing ongoing colonial processes in our workplaces.

We are also deeply grateful to the Compassionate Community Champions across Canada who contributed to the development of this guide through the participation in the project's surveys, focus groups and the pilot phase. Without their valuable contributions, this guide would not have been possible.

Furthermore, we would like to extend our heartfelt appreciation to the project's leadership, advisory committee, and dedicated team members, whose expertise, guidance, and hard work were instrumental in shaping this guide.

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About this Guide

WHO IS THIS GUIDE FOR?

This guide is for anyone starting or leading a Compassionate Community initiative and wants to know how evaluation can help them clarify their goals, measure their progress and communicate their results. The guide will help you learn how to develop an evaluation plan and adapt it over time.

WHAT IS THIS GUIDE DESIGNED TO DO?

Using this guide will help you:

1. Understand some evaluation basics.

2. Describe your compassionate community initiative and what you hope to achieve.

3. Identify the type of evaluation that best fits your needs.

4. Choose key questions you would like to address in your evaluation.

5. Access helpful resources and tools.

6. Create an evaluation plan for your initiative.

About Compassionate Communities

WHAT IS A COMPASSIONATE COMMUNITY?

A **Compassionate Community** is a community of people who are passionate and committed to improving the experiences of those who are living with a serious illness, caregiving, dying and grieving. A Compassionate Community takes an active role in caring for people affected by these experiences, connects people to supports, raises awareness about end-of-life issues, and builds supportive networks.

A **community** can be a geographical location (e.g. city, town or neighbourhood), a social group (e.g. book club or running group), a group of people united by a common purpose (e.g. members of a faith community, co-workers or neighbours), and even an online community.

APPROACHES AND COMMON PRINCIPLES

While Compassionate Communities may vary in scope and activities, they share some common principles that guide their approaches, including that:

- Members of a Compassionate Community recognize that the experiences of serious illness, caregiving, dying and grieving is **part of everyone's journey** through life and that they can happen at any time.

- Members of a Compassionate Community also recognize that care for one another through these experiences is not a task solely for professionals, but rather that **everyone can participate**.

- Compassionate Communities must work toward **equity**, celebrate **diversity** and be **inclusive** of all people.

EXAMPLES OF COMPASSIONATE COMMUNITY INITIATIVES IN CANADA

Compassionate Community initiatives can be large, community-wide involving multiple projects/activities over many years, or even a simple, short-term activity. This map shows how compassionate communities are spreading across Canada.

THE COMPASSIONATE COMMUNITIES LANDSCAPE IN CANADA

YUKON

NORTHWEST TERRITORIES

NUNAVUT

BRITISH COLUMBIA — 1

>120

ALBERTA — 1

45

SASKATCHEWAN

2

MANITOBA

1

NEWFOUNDLAND AND LABRADOR

ONTARIO — 1

41

QUEBEC — 1

12

PRINCE EDWARD ISLAND

NEW BRUNSWICK

1

NOVA SCOTIA

1

1 — Number of Compassonate Community initiatives
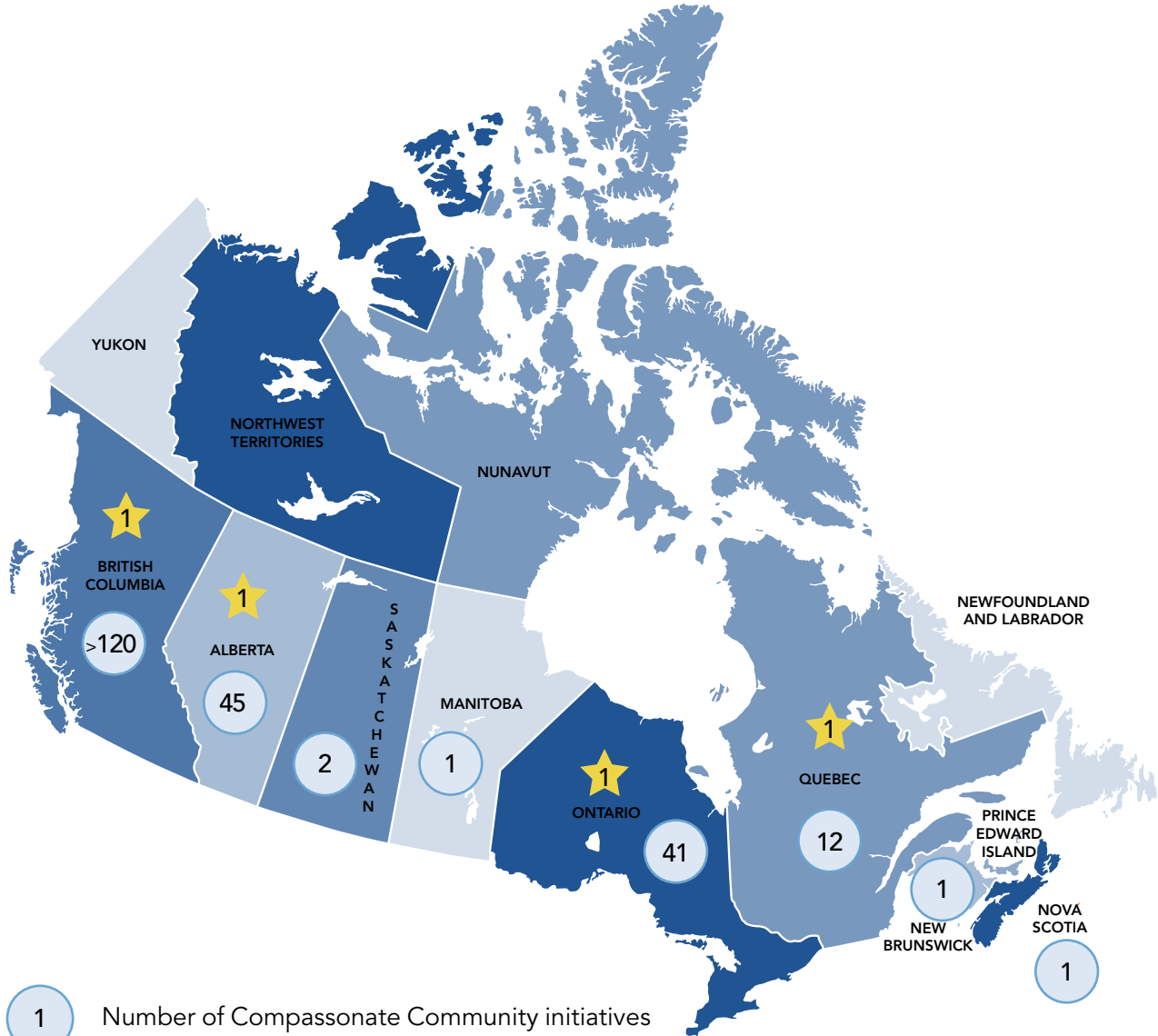
1 (star) — Provinces with provincial supporting organizations

Pallium Canada supports Compassionate Communities across Canada either in conjunction with provincial support organizations or directly where one is not present.

LEARN MORE

If you would like to learn more about Compassionate Communities in Canada and how to start one, please see the links below.

Provincial and pan-Canadian organizations coordinating and supporting local Compassionate Communities

- **Pallium Canada** (nationwide)

- **BC Centre for Palliative Care** (British Columbia)

- **Hospice Palliative Care Ontario** (Ontario)

- **Compassionate Alberta** (Alberta)

Compassionate Cities

A list of Canadian cities using the Compassionate City Charter as a guiding framework.

- **Compassionate Ottawa**

- **Compassionate New Westminster**

Local Compassionate Communities Initiatives

Across Canada, there are currently hundreds of local compassionate community initiatives focused on various needs, with this number continuously growing.

- **Windsor-Essex Compassionate Care Community**

- **Examples of Compassionate Communities in British Columbia**

- **Examples of Compassionate Communities in Ontario**

Organizations leading research projects

Across Canada, there are currently hundreds of local compassionate community initiatives focused on various needs, with this number continuously growing.

- **Montreal Institute for Palliative Care**

- **University of Windsor, Windsor-Essex Compassion Care Community**

- **HELP Ottawa Project**

Evaluation Basics

NEW TO EVALUATION?

Let's face it: the word "evaluation" can sometimes be a bit intimidating. It can also seem like another thing on the 'to-do' list when you'd rather be focusing on your day-to-day work.

In truth, evaluation (or measurement) is one of the most helpful activities you can do as part of your initiative. Evaluation is the process of looking at what you hope to achieve and assessing how your activities are helping you reach your goals, or not. Evaluation increases your chances of success and evolves along with your initiative. You can revisit your evaluation plan throughout your initiative to make sure you're on track.

Ready to know more? Let's learn a bit about what evaluation is really about.

WHAT IS EVALUATION?

> According to the Canadian Evaluation Society: "Evaluation is the systematic assessment of the design, implementation or results of an initiative for the purposes of learning or decision-making." [1]

So what does this mean? Let's take a look at each part of the definition individually:

1. **Systematic**: Evaluation work is carried out systematically and methodically. This makes sure that the activities you're doing provide you with the information you need to measure your results in a credible and reliable way. An evaluation plan helps you be strategic about what activities will be most helpful to your initiative now and into the future.

2. **Assessment**: Evaluation assesses something. When assessing either particular aspects of your initiative or your initiative as a whole, you are choosing to apply a critical lens in order to better understand your initiative and how it can be improved. Evaluation can also serve to communicate your results, such as your successes, challenges and lessons learned. At its core, evaluation always has the aim of making your initiative the best it can be.

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1   Canadian Evaluation Society. (2023). *What is Evaluation?* Evaluation Canada. https://evaluationcanada.ca/career/what-is-evaluation.html

3. **Initiative**: The 'initiative' being evaluated is your Compassionate Community program, project, activity, service, campaign or just about anything you want to assess! This means aligning your evaluation to your particular context, making it as simple or as complex as it makes sense for your needs.

WHY EVALUATE?

Evaluation is an important part of any initiative whether it is still in the planning phase, under implementation or has been running for several years.

Evaluation can help you:

- Clarify your initiative's goals and track its results.

- Ensure your initiative is on the right track.

- Showcase the impact of your initiative to partners, community members and funders.

- Attract new funding and new partnerships — contributing to the sustainability and growth of your initiative.

WHAT DOES AN EVALUATION ASSESS?

The focus of your evaluation depends on what stage your initiative is in. No matter where you are with your initiative, you can look to evaluation to help you steer it in the right direction. The most successful initiatives often carry out evaluation activities throughout key stages in their development. See **Stages of Development for Compassionate Communities** section for more information.

Generally speaking, evaluation can assess:

- The levels of interest and readiness in the community for your proposed initiative, and which audiences could benefit from it.

- How well your initiative is designed, implemented and delivered.

- How appropriate, relevant or accessible the support provided through your initiative is to your target audience.

- How much progress has been made toward achieving your initiative's goals.

- Lessons learned after the completion of each stage and the opportunities for improvement.

- The results, outcomes and impact of your initiative.

COMMON TYPES OF EVALUATION

While there are many types of evaluation to choose from, Compassionate Community initiatives will most likely benefit from one of these four common types of evaluation:

- **Needs Assessment**: If you haven't started your initiative, you might consider conducting a needs assessment. This type of evaluation helps you gather information about the extent of the need for your initiative and what can be done to achieve your desired outcomes. The Needs Assessment findings, along with a list of existing assets in the community that could be used to reach your initiative's goals, are essential information when applying for start-up funding for your initiative.

- **Implementation Evaluation:** If you are in the early stages of your initiative, you can do what's called an implementation (or formative) evaluation to help you learn how well your initiative is being implemented and identify early issues that can be immediately addressed. Picking up on issues early on can help you avoid bigger problems from emerging in the long run.

- **Outcome Evaluation:** If your initiative is up and running, an outcome (or summative) evaluation can help you understand the short- and medium-term effects of your initiative on the people participating in it. You can share your successes and gather evidence for future development. Don't leave it right to the end! It's always a good idea to figure out what outcomes you're hoping to achieve and how you will measure them at the beginning of the initiative. This way you can collect the most useful data to make practical decisions along the way.

- **Impact Evaluation**: An impact evaluation is carried out much further down the road and will help you understand the longer-term effects of your initiative on the wider community, including the health and well-being of your target population. In an ideal world, we'd all be doing impact evaluations to know the long-term effects of our work in our communities. However, conducting this type of evaluation would require guidance and support from evaluation experts or academic researchers.

LEARN MORE ABOUT EACH TYPE OF EVALUATION

- <u>Needs Assessment</u>

- <u>Implementation Evaluation</u>

- <u>Outcome Evaluation</u>

- <u>Impact Evaluation</u>

COMMON EVALUATION TERMS

Below are some common terms that are good to know when evaluating an initiative (you may already know a few). It's helpful to have a common vocabulary with others evaluating their Compassionate Community initiatives.

Term	Definition
Activity	Actions taken or work performed as part of an initiative.
Data collection tools	Methods used to collect information, such as surveys, interviews, focus groups, web analytics and literature reviews.
Input	The financial, human and material resources used to develop an initiative.
Logic model	A commonly used visual representation of an initiative that demonstrates how it is expected to achieve its goal(s) over the short-, medium- and long-term. It can be applied to small- and large-scale initiatives.
Outcome	The expected short-, medium- and long-term results, impact or effect of the initiative.

Term	Definition
Output	The products and services developed as part of an initiative.
Qualitative data	Information that cannot be counted, measured or easily expressed using numbers and is usually analyzed by creating themes. Qualitative data is commonly collected during interviews, focus groups and open-ended comments in surveys. Qualitative data adds feeling and a story to your evaluation work.
Quantitative data	Information that can be counted, measured and given a numerical value and used for statistical analysis. Quantitative data is commonly collected using close-ended survey questions and interviews if enough interviews have been conducted using the same questions.
Performance measure/ indicator	A measure that can be tracked to understand changes following initiative activities and shows results such as the # of sessions held or % of participants who report increased awareness of the topic.
Theory of change	A theory that explains how initiative activities will lead to the achievement of longer-term goals. Like a logic model, it can be applied to small- and large-scale initiatives and is often used in the community development field.

Evaluating a Compassionate Community Initiative

WHAT TO CONSIDER BEFORE STARTING AN EVALUATION

1. **Get your team on board.**

   Compassionate Community teams might have varying levels of knowledge and experience when it comes to evaluation. To ensure a successful evaluation experience, it's important to make sure your team is on board and has an adequate level of understanding of evaluation.

   For team buy-in, consider the following strategies:

   - ✓ Improve their awareness and understanding that:

     - ▪ Evaluation is an essential part of any initiative.

     - ▪ Evaluation will help us achieve the best results.

     - ▪ Imperfect evaluation is better than not doing any!

   - ✓ Train staff on basic evaluation techniques, or work with a consultant or local researchers to complete your evaluation.

   - ✓ Look for feedback on how your initiative is doing by adding evaluation activities throughout the life of your initiative.

   - ✓ Be sure to make time to learn from mistakes and poor results. This can be one of the hardest parts of the evaluation process but also among the most meaningful.

   - ✓ Encourage knowledge sharing within your team, organization or with partners.

2. **Start with a simple, focused evaluation that your team can handle.**

   Evaluation can look very different from one initiative to another. There is simply no single way of doing evaluation! Each Compassionate Community initiative serves a different audience, uses different service delivery approaches, has different goals, and operates in a different context. Evaluation, then, can range from very simple to complex based on your initiative's specific needs.

This guide is designed to help you create your Evaluation Plan according to your unique initiative. The key is to evaluate at the capacity your team can handle. If you are new to evaluation, you may want to start with something simple, such as:

- Looking at website data (Google Analytics).

- Getting feedback from key partners (interviews).

- Hearing back from your target audience (post-event surveys).

3. **Update and adapt your evaluation plan as needed.**

   Evaluation is part of a continuous cycle. Each evaluation activity can lead to practical changes to your initiative, which can then lead to new evaluation activities, etc. You can update and adapt your Evaluation Plan throughout your initiative to reflect changing needs and circumstances.

TIPS FOR CREATING AN EVALUATION TEAM

When creating your evaluation team, you want to be honest about your capacity to do evaluation activities. The goal isn't perfection. Remember, doing your evaluation activities imperfectly is better than not doing any! There are people who can help.

Depending on the complexity of your initiative, your evaluation can be conducted by members of your community such as staff and volunteers, by researchers, an evaluation specialist, or a combination of these. For organizations looking to assess the collective impact of their initiative, we recommend collaborating with experts if there is limited evaluation capacity within the organization.

Pro Tip: If you're unsure where to start, we encourage you to connect with your local university or relevant palliative care organization to explore the help available to you.

EVALUATION APPROACH

A simple way to think about evaluation is through the Plan, Do, Study, Act (PDSA) approach.

Going through each of the approach's four phases can help break down tasks, evaluate the outcomes, improve on them and evaluate them again.

For example, while every evaluation will look different in terms of size and focus, the evaluation phases will typically look something like this:
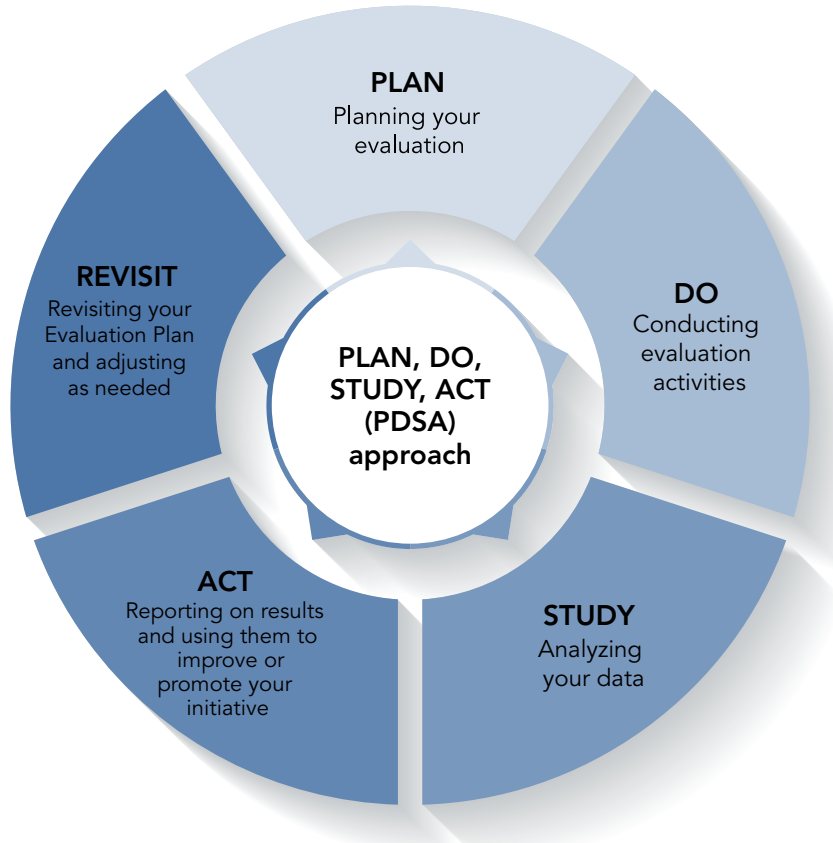
Pro Tip: You can use the PDSA approach in the planning, implementation and improvement of your whole initiative!

LEARN MORE
- Agency for Healthcare Research and Quality - PSDA Directions and Examples
- Institute for Healthcare Improvement - PDSA Worksheet

POSSIBLE STEPS IN AN EVALUATION

Click here to see a printable table with examples of steps you can take at each phase of your evaluation based on the Plan, Do, Study, Act approach. There, you can easily choose what steps to take based on what's most relevant to your initiative. We also encourage you to look at our **resources section** for links to helpful tools for each evaluation phase.

Pro Tip: When starting an evaluation, it's helpful to:

- Develop a logic model for the part of your initiative that you're evaluating.

- Look for information on how similar initiatives undertook their evaluation.

- Identify any potential barriers to your evaluation plan and consider possible solutions.

LEARN MORE
- **Community Toolbox – Evaluating Community Programs and Initiatives**
- **Tamarack Institute – Evaluating Community Impact**

Creating your Evaluation Plan

Before you begin building your evaluation plan, make sure you've completed the following steps:

- ✓ Your evaluation team and partners are confirmed, including external stakeholders or researchers.

- ✓ The team agrees on the initiative, program or activity within your initiative that you want to evaluate.

- ✓ Your initiative's goals, target audience, activities and expected outcomes are mapped out.

Now let's create your evaluation plan using four simple steps!

STEP #1: From the table below, identify the stage that best describes where your initiative is right now.

STAGES OF DEVELOPMENT FOR COMPASSIONATE COMMUNITIES

Initiative stage	Description
1. Not started	Interested in the concept but haven't started any activities yet.
2. Public awareness	Raising public awareness of the benefits of participating in a compassionate community.
3. Engaging partners	Engaging potential partners and the community to ensure support or commitment.
4. Co-planning	Forming a coordinating group or organization to start up the compassionate communities' initiative.
5. Initial implementation	Implementing activities or programs within its first six months.
6. Early implementation	Implementing activities or programs within its first year.
7. Mid-implementation	Implementing activities or programs within its second year.
8. Mature implementation	Implementing activities or programs within its third year or more.

See **Stages of Development for Compassionate Communities** for more information.
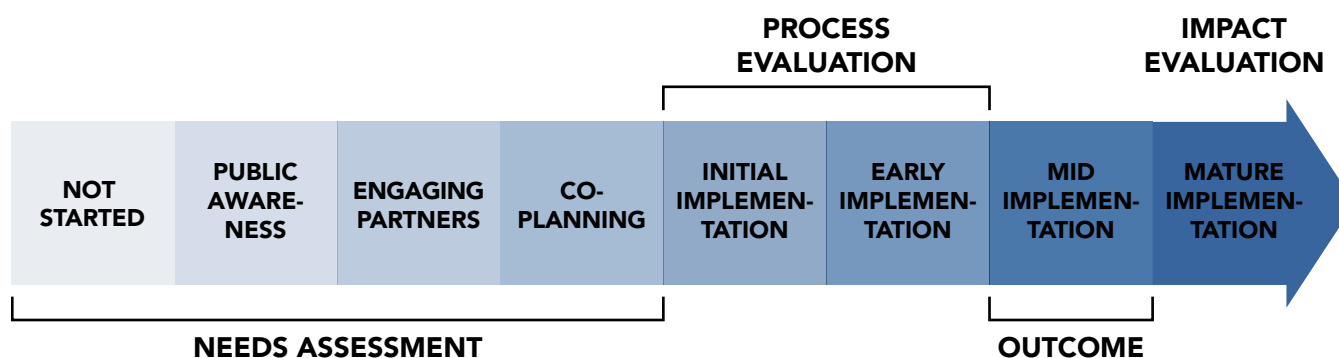
EVALUATION TYPE RECOMMENDED FOR EACH INITIATIVE STAGE

The highlighted example in the table below is for demonstration only.

Initiative stage	Recommended Evaluation Type	Timing
1. Not started	Needs assessment	At the outset
2. Public awareness		
3. Engaging partners		
4. Co-planning		
5. Initial implementation	Implementation evaluation	6 months to 1 year after implementation
6. Early implementation		
7. Mid-implementation	Outcome evaluation	2 to 3 years after implementation
8. Mature evaluation	Impact evaluation	3+ years after implementation

CANADIAN COMPASSIONATE COMMUNITIES' STAGES OF DEVELOPMENT

PROCESS EVALUATION · IMPACT EVALUATION

NOT STARTED · PUBLIC AWARE-NESS · ENGAGING PARTNERS · CO-PLANNING · INITIAL IMPLEMEN-TATION · EARLY IMPLEMEN-TATION · MID IMPLEMEN-TATION · MATURE IMPLEMEN-TATION

NEEDS ASSESSMENT · OUTCOME

STEP #3: From our <u>evaluation database</u>, select the most relevant evaluation questions, measures and data collection tools to include

EXAMPLE OF EVALUATION PLAN TEMPLATE

Evaluation type	Evaluation questions	Measurement data to collect	Ways to collect data	When to collect data
Implementation evaluation				

Pro Tip: You can also include additional evaluation questions or measures not listed in the evaluation database that are relevant to your initiative.

STEP #4: Create your own Evaluation Plan using the information above.

To download and print your own fillable Evaluation Plan template, **<u>click here.</u>**

To complete the Evaluation Plan online, **<u>click here</u>**.

NOW WHAT?

Wondering what to do once you've completed your plan? We suggest:

✓ Reviewing our **resources section** to learn more about conducting any of the four evaluation types described above.

✓ Proceeding with the remaining steps in **Evaluation Steps.**

NEED FURTHER INFORMATION?

Pallium Canada, the BC Centre for Palliative Care and Hospice Palliative Care Ontario are committed to providing Compassionate Community champions, like yourself, with helpful tools and resources to assist them on every step of their journey.

Please refer to our respective websites to stay up to date on what's new, including webinars on this Evaluation Guide.

Pallium Canada

BC Centre for Palliative Care

Hospice Palliative Care Ontario

WE NEED YOUR FEEDBACK!

We would like to ask for your help by providing us with your feedback. Your feedback will help us make practical adjustments to the guide to ensure it's meeting the needs of community champions like yourself.
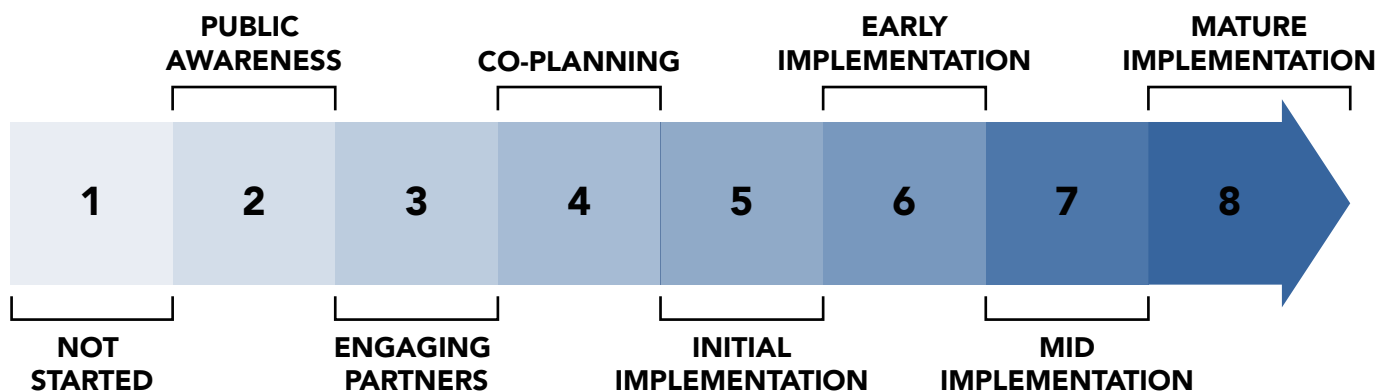
Please take a few minutes to complete **our short survey**.

Appendix 1 - Stages of Development for Compassionate Communities

To better evaluate your initiative, it's helpful to know what stage your initiative is in. For this, we've developed a simple diagram outlining the eight stages of development for Compassionate Community initiatives. As Compassionate Communities have been around for several years now, some initiatives may be further along in their development than others.

CANADIAN COMPASSIONATE COMMUNITIES' STAGES OF DEVELOPMENT

| | | | | PUBLIC AWARENESS | | | CO-PLANNING | | | EARLY IMPLEMENTATION | | | MATURE IMPLEMENTATION |

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |

NOT STARTED   **ENGAGING PARTNERS**   **INITIAL IMPLEMENTATION**   **MID IMPLEMENTATION**

Not sure where your initiative is at?

The table below can help you identify which stage is most aligned with where your initiative is right now.

Initiative stage	Description
1. Not started	Interested in the concept but haven't started any activities yet.
2. Public awareness	Raising public awareness of the benefits of participating in a compassionate community.
3. Engaging partners	Engaging potential partners and the community to ensure support or commitment.
4. Co-planning	Forming a coordinating group or organization to start up the compassionate communities' initiative.
5. Initial implementation	Implementing activities or programs within its first six months.
6. Early implementation	Implementing activities or programs within its first year.
7. Mid-implementation	Implementing activities or programs within its second year.
8. Mature implementation	Implementing activities or programs within its third year or more.

Appendix 2 - Evaluation Steps

Evaluation Phase	Possible Steps[1]
Plan	• **Establish your evaluation team and partners.** We can't stress enough how important it is to determine who'll be involved throughout your evaluation process and to make sure they're on board. See **Tips for Creating an Evaluation Team.** • **Map out the initiative you intend to evaluate** to ensure your team members and partners have the same understanding about your initiative. This is where you'll identify your focus, target population, proposed solution, resources, activities, and expected outcomes. See **How to Map Out Your Initiative**. • **Create Your Evaluation Plan** using this guide to help you identify the most relevant evaluation questions, appropriate evaluation measures and data sources, and data collection tools. • **Secure budget for the evaluation,** if needed. • **Develop data collection plan and tools** such as guides or spreadsheets.

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1   **Program evaluation toolkit: Tools for planning, doing and using evaluation** (Knowledge Institute on Child and Youth Mental Health and Addictions)

Evaluation Phase	Possible Steps[1]

Do	• **Collect evaluation data** using existing sources or the tools you developed earlier, such as:
	
	  • surveys (consider using free survey applications that provide simple analytic reports, such as Survey Monkey)
	
	  • website and social media analytics
	
	  • interviews
	
	  • focus groups
	
	  • review of internal documents (e.g., project documentation)
	
	  • review of available literature (e.g., research papers, websites)

Study	• **Analyze and summarize evaluation data:**
	
	  • Quantitative (#,%) - think statistics
	
	  • Qualitative (verbal or written answers, summarized by themes to tell a story and bring more feeling into the results).
	
	• **Get feedback on the evaluation results** from your team and partners.
	
	• **Draft evaluation report.**

Act	• **Share report and evaluation results** with the community, stakeholders and potential funders. • **Develop an action plan for making use of evaluation findings.** • **Implement changes in your initiative accordingly.**
Revisit	• **Make adjustments to your Evaluation Plan** based on the changes made to your initiative and the lessons learned such as what should we do or measure differently next time?

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1   **Program evaluation toolkit: Tools for planning, doing and using evaluation** (Knowledge Institute on Child and Youth Mental Health and Addictions)

Appendix 3 - How to Map out Your Initiative

Once you know the Stage of Development your initiative is in, it's important that you and your team clearly understand your goals and what it is you're hoping to achieve. Two of the simplest ways to do this are to create either a logic model or a theory of change.

LOGIC MODEL

A logic model is a visual representation of your initiative that can help you easily see how your activities are expected to contribute to achieving your initiative's outcomes and overall goals. It's a good opportunity to look at your initiative to see if all the pieces make sense. This has the added benefit of facilitating the development of an evaluation plan since you'll have a better sense of what information you need and what's most important for you to measure. It's also a great way to ensure your team members and partners all have the same understanding about your initiative and its intended results over the short-, medium- and long-term.

While it's not a necessary part of the evaluation process, especially for simple, short-term initiatives, logic models are a commonly used and practical tool to guide the planning of an initiative.

A typical logic model includes the resources that will be used for the initiative (inputs such as financial and human resources, partnerships and in-kind contributions), the activities that will be undertaken and products/services that will be developed (outputs), who will be participating in the initiative (e.g., partners and target audience) and the outcomes you expect to achieve. In a logic model, the relationship between these components is demonstrated using arrows.

Inputs (Resources)	Activities/Outputs	Participants	Outcomes
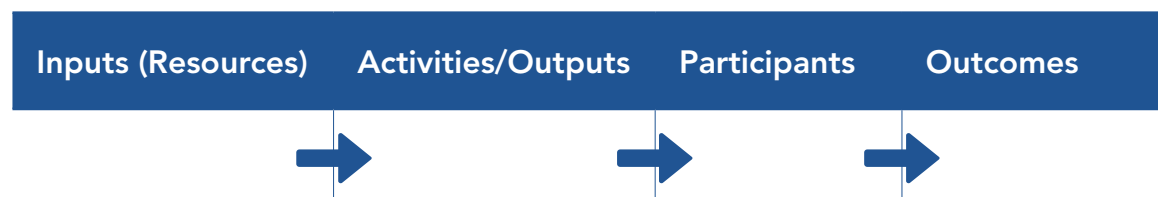
THEORY OF CHANGE

A common alternative to logic models when working on community-based participatory research is called Theory of Change. A Theory of Change helps to describe how and why a desired change can be expected to occur. It uses an Outcomes Framework to map out what is known as the "missing middle" between what an initiative does (its activities) and how these will lead to desired goals. It does this by identifying the desired long-term goals of an initiative and then working backwards to identify all the outcomes that must occur, and how they are causally related, for the goals to be achieved.

LEARN MORE

Logic Models:
- **Exploring Program Logic** (NSW Health)
- **Creating Project Logic Models** (Better Evaluation)
- **Logic Model Workbook** (Innovation Network)

Theory of Change:
- **Center for Theory of Change**
- **Theory of Change** (Better Evaluation)
- **Theory of Change Video** (DIY Toolkit)
- **Methodological Brief on Theory of Change** (UNICEF)

If you decide to complete a logic model or theory of change, you'll want to work with your team to:

1. Confirm the contents internally and with partners.

2. Identify which parts of the logic model or theory of change you would like your evaluation to focus on.

3. Brainstorm some evaluation questions that are important to answer about the initiative. See the **Evaluation Database** for possible questions.

Once you've confirmed your logic model or theory of change with your team, community and stakeholders, or otherwise confirmed your initiative's goals and expected results, you're ready to create your Evaluation Plan!

Resources

Here's a list of resources to help you get started on your evaluation based on your initiative's current Stage of Development. We've also included other related resources that can help you as you develop and refine your Compassionate Community initiative.

Pro Tip: Refer to tools from other Stages of Development to inform your evaluation.

GENERAL EVALUATION RESOURCES

Criteria for Selection of High-Performing Indicators (Better Evaluation)

This article is a checklist designed to help you reflect on the indicators you are planning to use in your evaluation plan.

Evaluating Community Impact (Tamarack Institute)

The Evaluating Community Impact page offers helpful resources for community organizations looking to evaluate the impact of their initiatives.

Evaluating Community Programs and Initiatives: Chapters 36–39 (Community Toolbox)

The Evaluating Community Programs and Initiatives section provides information on developing a plan for evaluation, evaluation methods, and using evaluation to understand and improve community initiatives.

Rainbow Framework (Better Evaluation)

The Rainbow Framework shows the different methods and processes that can be used for each task in an evaluation.

<ins>**Strengthening Evaluation Literacy – Demystifying Participatory and Collaborative Approaches to Evaluation (Tamarack Institute)**</ins>

This article will increase your knowledge and understanding of why it is important for community-led initiatives like yours to engage the community in your evaluation process.

<ins>**Sustainability Guide (Pallium Canada)**</ins>

The Sustainability Guide provides best practices, case studies, and tools for current Compassionate Community initiatives in Canada to help ensure long-term sustainability of their efforts. See the section titled **Measuring impact – evaluation** for insightful articles and tools to support your work.

INITIATIVE STAGES 1–4 — NEEDS ASSESSMENT

Not Started

<ins>Compassionate Community Index (BC Centre for Palliative Care)</ins>

The Compassionate Community Index Tool will help you to assess your community's readiness to help those in need of grief, illness and caregiving supports.

<ins>Death Literacy Index (The Groundswell Project)</ins>

The Death Literacy Index is a way of measuring and understanding what contributes to people's level of death literacy. It provides a population-based measure of death literacy to determine current levels of death literacy at a whole of population, workforce and local level and measure the impact of local and wide-scale initiatives.

<ins>Environmental Scan and Logic Model (Johnson Shoyama Graduate School of Public Policy)</ins>

The Environmental Scan tool will help you analyze what environmental factors are affecting your organization's success so that you can tailor your goals for the future.

<ins>Mapping our Ecosystem (Tamarack Institute)</ins>

This tool will help you create a visual of the landscape of your initiative, and can highlight gaps, assets, potential stakeholders and more.

Public Awareness

Conducting Focus Groups (University of Minnesota)

The Designing and Conducting Focus Group Interviews tool will help you design and conduct focus group interviews.

Conducting Surveys (Community Toolbox)

The Conducting Surveys tool will inform you on how to survey your target population in order to obtain data through a list of questions.

Hosting a Citizen's Jury (Tamarack Institute)

The Hosting a Citizen Jury tool will help you acquire opinions from not only experts but also everyday individuals, service providers, target groups and those who are making decisions.

Strategies for Qualitative Interviews (Harvard University)

The Interview Guide Tool will explain step-by-step how to conduct an interview.

Engaging Partners

Community Engagement Planning Canvas Tool (Tamarack Institute)

The Community Engagement Planning Canvas Tool can help you make decisions regarding community engagement.

Stakeholder Engagement Wheel (Tamarack Institute)

The Stakeholder Engagement Wheel will help you quickly and effectively learn individuals' preferred level of engagement in your initiative.

The Landscape Diagram (Tamarack Institute)

The Landscape Diagram is a useful tool to help community changemakers see, understand, map and influence current conditions and the system barriers that might be enabling or preventing them from moving forward (most helpful for large-scale initiatives).

Co-Planning

Collaboration Self-Assessment (Community Toolbox)

The Collaboration Self-Assessment Tool will help you compare
your efforts with those of potential competitors.

Exploring our Gives, Gets & Constraints (Tamarack Institute)

This tool will help ensure team members' goals,
needs and roles are clear and understood.

Planning your Backbone Support (Tamarack Institute)

The Planning your Backbone Support tool helps provide members with an
overview of the key framework, decision, and progress that has been made.

INITIATIVE STAGES 5–6 — IMPLEMENTATION EVALUATION

Initial/Early Implementation

Capturing Results Worksheet (Tamarack Institute)

This tool will help you organize your results and progress so
you can figure out if any changes need to be made.

Collective Impact Year 1 Action Plan Framework (Tamarack Institute)

This framework provides you with an in-depth look at what
you are trying to achieve and questions that will help you form
your collective impact after year 1 of your initiative.

Conducting Focus Groups (University of Minnesota)

This tool will help you design and conduct focus group interviews.

Conducting Surveys (Community Toolbox)

This tool will inform you on how to survey your target population
in order to obtain data through a list of questions.

Exploring our Gives, Gets & Constraints (Tamarack Institute)

This tool will help ensure team members' goals,
needs and roles are clear and understood.

Hosting a Citizen's Jury (Tamarack Institute)

This tool will help you to acquire opinions from not only experts but also everyday
individuals, service providers, target groups and those who are making decisions.

Planning your Backbone Support (Tamarack Institute)

This tool helps provide members with an overview of the key frameworks, decisions and progress that has been made.

Rose, Bud, Thorn (Tamarack Institute)

This framework can help you gather feedback from a large group while keeping conversations on topic.

Start, Stop, Continue (Tamarack Institute)

This tool will help you organize your initiative, bring clarity and help you figure out what you should continue to do, stop or start doing.

Strategies for Qualitative Interviews (Harvard University)

This tool will explain step-by-step how to conduct an interview.

The Landscape Diagram (Tamarack Institute)

The Landscape Diagram is a useful tool to help community changemakers see, understand, map and influence current conditions and the system barriers that might be enabling or preventing them from moving forward (most helpful for large-scale initiatives).

INITIATIVE STAGE 7 — OUTCOME EVALUATION

Capturing Results Worksheet (Tamarack Institute)

This tool will help you organize your results and progress so you can figure out if any changes need to be made.

Conducting Focus Groups (University of Minnesota)

This tool will help you design and conduct focus group interviews.

Conducting Surveys (Community Toolbox)

This tool will inform you on how to survey your target population and obtain data through a list of questions.

Getting to Impact: Outcome Diary (Tamarack Institute)

This tool can help you map the changes your initiative is having on three levels – individuals and families, the community, and policy and systems.

Hosting a Citizen's Jury (Tamarack Institute)

The Hosting a Citizen Jury tool will help you acquire opinions from not only experts but also everyday individuals, service providers, target groups and those who are making decisions.

Rose, Bud, Thorn (Tamarack Institute)

This framework can help you gather feedback from a large group while keeping conversations on topic.

Strategies for Qualitative Interviews (Harvard University)

This tool will explain step-by-step how to conduct an interview.

Sustaining Collective Impact Efforts (Tamarack Institute)

This self-assessment tool based on seven factors of sustainable community change will help identify strategies for building a sustainable initiative.

The Landscape Diagram (Tamarack Institute)

The Landscape Diagram is a useful tool to help community changemakers see, understand, map and influence current conditions and the system barriers that might be enabling or preventing them from moving forward (most helpful for large-scale initiatives).

INITIATIVE STAGE 8 — IMPACT EVALUATION

Conducting Focus Groups (University of Minnesota)

This tool will help you design and conduct focus group interviews.

Conducting Surveys (Community Toolbox)

This tool will inform you how to survey your target population and obtain data through a list of questions.

Hosting a Citizen's Jury (Tamarack Institute)

The Hosting a Citizen Jury tool will help you acquire opinions from not only experts but also everyday individuals, service providers, target groups and those who are making decisions.

Rose, Bud, Thorn (Tamarack Institute)

This framework can help you gather feedback from a large group while keeping conversations on topic.

Strategies for Qualitative Interviews (Harvard University)

This tool will explain step-by-step how to conduct an interview.

Sustaining Collective Impact Efforts (Tamarack Institute)

This self-assessment tool based on seven factors of sustainable community change will help identify strategies for building a sustainable initiative.

The Phases of Community Change Eco-Cycle Mapping Tool (Tamarack Institute)

This tool will help you identify and address common traps in a collaborative community change cycle.

The System's Change Evaluation Canvas (Tamarack Institute)

This canvas will help you explore some of the critical considerations when designing a systems-change evaluation and navigate the resources available.

compassionate communities

"Even worthwhile endeavours need evaluation in order to determine if they have become distractions from the best goals."

- Quentin L. Cook