

Fact Sheet: 2025 Shared Care Evaluation Template Update

How does Reichert & Associates support project teams?

Reichert & Associates (R&A) supports Shared Care project teams by providing evaluation support in two primary ways, depending on the specific project needs.

- **When R&A is the primary evaluator:**

R&A is involved from start to finish, from the Expression of Interest (EOI) stage all the way to the final report. That includes helping teams create evaluation plans, develop data collection tools, gather and analyze data, and create reports that highlight what's working and what has been learned.

- **When another evaluator is leading:**

Even if another evaluator is taking the lead on evaluation, R&A still provides support. They review submitted evaluation plans, offer feedback, and document key indicators from project reports.

Across both roles, R&A's focus is on making sure evaluations align with Shared Care's goals and that the findings can be shared meaningfully. R&A also compiles **quarterly and annual reports** to summarize key learnings across Shared Care projects and communicates those insights to the Shared Care Committee and partners.

What is the evaluation plan review process?

To help make sure every evaluation is clear, useful, and feasible, R&A uses a standard template to review all project evaluation plans. This approach helps us stay aligned with Shared Care priorities, such as the IHI Quintuple Aim and Shared Care's shared measures.

Following the review of evaluation plans, each plan receives one of the **three outcomes**, which is communicated to them by their Shared Care liaison:

- **Accepted:** The plan is complete, feasible, and clearly articulated, aligning with Shared Care priorities and requiring minimal or no edits. The project team is informed of the evaluation plan's approval via email through their designated liaison.
- **Minor Edits:** The plan is mostly complete and clear, but needs a few revisions for clarity, alignment or completeness. The project team is notified by email and may request a meeting with the R&A review team if there are any questions or clarifications needed.
- **Major Edits:** The evaluation plan contains significant gaps in clarity, feasibility, and completeness, requiring more substantial revisions before the project can proceed. A meeting with the project team is required to discuss the gaps, changes, and next steps.

If edits are required, a reasonable timeframe to resubmit will be discussed with the project team, depending on project progress and urgency.

What is changing about the template?

The Shared Care Evaluation Plan template has been refreshed to reflect best practices in evaluation. These updates are designed to support more comprehensive and accurate evaluation processes across projects.

Key updates include:

- A field to capture the evaluator's name and organization.
- The Objectives section was refined to Project Objectives and now focuses more on the Quintuple Aim and Shared Measures.
- The target population and project deliverables were removed, as these are available in the project proposal. New sections, "Evaluation Questions," "Evaluation Methodology," and "Evaluation Timeline," were added to increase the clarity and direction of the evaluation.
- The evaluation matrix was split into two tables, one for process evaluation and the other for outcome evaluation. The process evaluation table includes associated evaluation questions with corresponding sub-questions. The outcome evaluation process includes the Shared Care outcomes selected and the project's alignment with the IHI Quintuple Aim.
- An optional section called "Logic Model" was added to allow for the inclusion of how the project activities and outputs connect to the intended outcomes.

Is the final report template also being updated to reflect the new evaluation plan template?

The final report template is not being updated at this time. While the evaluation process may result in stronger evidence and more consistent reporting across projects, the structure and headings of the final report will remain the same. The change will be in the level of detail and quality of content, not in the format itself.

Are existing Shared Care measures being updated or changed?

Currently, there are no changes to shared measures. A collaborative project is underway across the Joint Collaborative Committees (JCCs) to develop a more comprehensive measurement framework, grounded in the IHI Quintuple Aim. For those already using Shared Measures, please continue; and for those just beginning, continue to use the current Shared Measures framework.

Is there an impact framework that is being used across projects by R&A?

R&A uses the IHI Quintuple Aim and other guiding frameworks previously adopted by Shared Care to inform project evaluations and shape evaluation questions. A guiding framework for all JCC-funded work is currently in development.

Who compiles shared measures across projects to guide planning and improvement?

The Specialist Services Committee's Analytics and Decision Support team helps monitor data submitted through the final report and quarterly reporting portals and is responsible for maintaining and aggregating that data.

Additionally, R&A will create summary reports across the Shared Care projects to account for shared measures, overall impacts, and findings.

What was the origin of the template update and who was consulted?

The decision to update the evaluation plan template came because there was a clear need to strengthen the consistency of evaluations across Shared Care projects. It also presented an opportunity to better align with system-level goals like the Quintuple Aim and Shared Measures.

To help shape the new version, R&A has relied on best practices, reviewed feedback from past project cycles, and consulted with Shared Care leadership. We also gathered input from project liaisons to make sure the updated template would be practical and meaningful for teams on the ground.

How does this impact current projects?

Current projects are not reviewed based on the updated evaluation plan template just yet. This will only apply to projects approved **after May 2025**.

The new version is being rolled out as part of our ongoing effort to improve how R&A evaluates projects and ensure Shared Care projects are aligned with larger system goals. For now, R&A will continue reviewing existing evaluation plans using the original template, but it will also share optional recommendations from the updated template as a helpful resource.

Where do I find the framework/template?

The template can be found on the **Shared Care Learning Centre** website (sharedcarelearningcentre.ca).

Go to the **Tools and Resources** tab, then click "**View Resources**" under the Evaluation section.

Under Forms & Templates, click "**Template: Evaluation Plan**", or click this direct link: [Shared-Care-Evaluation-Plan-Template-2025.docx](#)

When does the template need to be completed?

Ideally, the evaluation plan template is completed and submitted along with the project proposal during the EOI phase. If that's not possible, it should be completed within three months of the funds transfer.

How will I know if my evaluation plan is approved?

Your assigned liaison will inform you once your evaluation plan has been reviewed and approved. If revisions are needed, R&A will provide written feedback outlining the suggested changes. Once the updated version is submitted and meets the necessary criteria, your liaison will confirm approval.

Can I use my own evaluator?

Project teams can choose to work with either an external or internal evaluator of their choice.

For those who choose their own evaluator, R&A will review your evaluation plan and share feedback to help ensure it aligns with Shared Care's expectations. Once your final report is ready, R&A will also extract key insights to contribute to system-level summaries and shared learning.

When should we contact R&A?

If you think you'll need support developing your evaluation plan, it's a good idea to contact R&A early, ideally when you're putting together your Expression of Interest submission. Early engagement allows more time to ensure your approach aligns with Shared Care's expectations and receive guidance on framing objectives, selecting measures, and planning data collection.

For those using their own evaluation support, there is no need to contact Reichert and Associates directly. If there are changes that we recommend, we will be in contact with the project team via the liaisons.

Is there a limit on the amount of evaluation support available through this review process?

There is no strict limit, but the level of support provided by R&A depends on the project's needs and scope. Typically, R&A provides an initial one-hour consultation after Shared Care approves the proposal, either upon request or if significant changes are needed for the approval of your evaluation plan, once R&A has reviewed your plan. Additional support may be available on a case-by-case basis, especially if there are major shifts in the project that require revising the evaluation plan. In such cases, R&A will review the updated plan and offer guidance as needed. If you anticipate needing extended support, please speak with your Shared Care liaison to discuss what's appropriate and ensure alignment with your project budget.

For multi-year projects, should the evaluation support budget be calculated as approximately one hour per year, or as a total number of hours spread across the full project lifespan?

If your project spans multiple years, it's best to think about the evaluation support budget in terms of what you'll need across the full project rather than planning for a fixed amount per year. The number of hours can vary depending on how complex the project is and what kind of support you'll need at different stages. A one-hour consultation is offered by request via your liaison, including when major changes are required to your evaluation plan, with additional time provided if needed. If R&A is serving as the primary project evaluator, the budget should account for their support throughout the project, including consultation, review of evaluation plans, and updates required at key milestones such as funds release.

What if the project changes?

If R&A is serving as your primary evaluation support and your project changes, for example, in scope, activities or timeline shifts, your evaluation plan will be updated to reflect those changes. Evaluation is most effective when it aligns with the work being done.

You can connect with R&A at any point to adjust your evaluation plan. We're here to support you in making sure your evaluation remains relevant, accurate, and useful as your project evolves.

If you are working with an evaluator independent of R&A and the scope of your project changes significantly, such as a shift in subject matter or overall focus, the current project evaluation should be formally wrapped up, including documentation of lessons learned to date. A new evaluation plan should then be developed and submitted to R&A for review.

If the changes are minor, such as timeline adjustments or small refinements to activities, your evaluator can update the evaluation plan to reflect those changes. In these cases, resubmission to R&A is not required, but the updated plan should be saved for documentation and future reporting.

How does R&A manage data privacy and custodianship for Shared Care projects, especially to reassure physician leads?

Data ownership remains with the fund holder as outlined by the Divisions of Family Practice. Additionally, R&A ensures that all shared data is kept safe and confidential.

Does Shared Care currently have an established relationship with any of the health authorities that might support data collection or access processes?

Shared Care maintains relationships with health authorities to support data access and other evaluation needs. These connections include representation from health authorities on committees such as the Specialist Services Committee (SSC) and involvement in initiatives like the Physician Quality Improvement (PQI) program.

What if we already use Reichert for evaluation?

If you're already working with Reichert & Associates (R&A) as your project evaluator, no additional steps are needed. R&A will continue to support your evaluation work from developing your plan to collecting and analyzing data and preparing final reports. You're already aligned with the support process, and R&A will ensure everything meets Shared Care's evaluation expectations.

Is this mandated or can an alternative suggestion or direction be agreed to?

The updated evaluation plan template is **not mandatory** for existing projects. It's expected for new projects approved **after May 2025**, but we understand that every project is different in its unique needs and contexts.

If you have a different approach in mind or want to suggest an alternative, R&A is open to discussion. The main goal is to support effective and meaningful evaluation. R&A is happy to work with teams to ensure flexibility while remaining aligned with Shared Care's overall evaluation goals.

Are there extra costs for this and how will these be paid?

There are no additional costs for receiving feedback from Reichert & Associates (R&A). There is approximately one hour of additional consultation time that can be accessed through R&A to review your plan, and get feedback or suggestions.

How should we budget for evaluation support, including when working with Reichert & Associates?

The cost for evaluation support depends on the scope of the project. Typically, projects budget between 10-15% for evaluation cost overall, and this percentage can be adjusted to fit the complexity and needs of each project. The estimate is provided during the consultation with an evaluator during the EOI or project phases. Some factors that influence the cost estimate are the development of an evaluation plan, and data gathering and collection processes.

Appendix A

Definitions:

- An **evaluator** is a person responsible for assessing the impact and effectiveness of a program or project.
- **Evaluation questions** are essential questions that guide what you want to learn from evaluating a program or project and help identify the most important aspects to understand or measure. These questions are typically aligned with the project's goals. Key questions asked help to determine whether the program is working as intended, how it's being implemented and its impact.
- **Evaluation methodology** outlines specific methods used to describe the approaches taken to how the evaluation will be carried out. This includes what kind of data is to be collected, e.g., surveys and interviews, how the data will be collected, where the source of the data being collected and how the data will be analyzed.
- **Evaluation timeline** is a schedule that details when important evaluation activities will take place throughout the course of a project.
- An **evaluation framework** is a big-picture tool that serves as the blueprint for how a project will be evaluated. It outlines the overall approach, including the purpose of the evaluation, key questions to be answered, guiding principles, and the methods that will be used. It also defines what is being evaluated and why, identifies the roles and responsibilities of those involved, and includes timelines and required resources. By setting the strategic direction for the evaluation, the framework ensures clarity, consistency, and alignment with project goals. If evaluation were a

building project, the framework would be the architectural plan that guides everything from foundation to finish.

- An **evaluation matrix** is a detailed table used to organize and clearly link the different parts of an evaluation plan. The table shows exactly how each evaluation question will be answered, connecting them to the methods, data sources, and indicators. If the evaluation framework is the blueprint, the matrix is the construction schedule.
- A **program logic model** is basically a way to map out how your project is supposed to work, start to finish. It maps the relationships between the resources available (inputs), the activities planned, the immediate outputs of those activities, and the short-, medium-, and long-term outcomes the project aims to achieve. It's useful for planning, communicating, and evaluating a project's progress and impact.