Shared Care Evaluation Plan Template

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| --- | --- |
| **Project Title** |  |
| **Estimated Timeline** (start to end) |  |
| **Evaluator** (Name & Organization) |  |

# Project background

Provide a brief summary to give context to the project. Briefly describe the problem the project targets, any relevant existing literature or data establishing the presence of this problem in the target community, and the importance of addressing the issue. This summary should be 3-4 sentences.

ENTER Project Background

# Project Aim statement

In this section, provide the Project Aim Statement as it appears in the project proposal to ensure that the primary goal of the project is clearly defined and distinguished from any evaluation-specific aims.

ENTER Aim Statement

# Project Objectives

*From the proposal, which Quintuple Aim and Shared Measures were identified as objectives of this project?*

ENTER Project Objectives

Evaluation Questions

*Include overarching formative and summative questions that the evaluation will answer. Examples are provided in the matrix below.*

ENTER Evaluation Questions

Evaluation METHODOLOGY

*Describe data collection methods and tools, explaining how they will address each evaluation question while ensuring ethical standards such as confidentiality, informed consent, and cultural sensitivity are upheld. The methodology should align with the evaluation’s purpose and questions, specifying whether a qualitative, quantitative, or mixed-methods approach will be used. Additionally, outline the data analysis techniques such as thematic coding for qualitative data or statistical methods for quantitative data. Identify potential limitations of the methodology along with strategies to mitigate them.*

ENTER Evaluation Methodology

# EVALUATION TimEline

*To complete the evaluation timeline table, list key evaluation activities (e.g., developing the framework, designing data collection tools, collecting and analyzing data, and drafting the final report) in the “Anticipated Evaluation Activity” column. In the “Details” column, describe each activity, including its purpose and specific tasks or milestones (e.g., "Create a detailed evaluation framework, including goals, metrics, and methodology"). Use the “Anticipated Timeframe” column to specify when each activity will occur, including timeframes (e.g., "June to July 2024") and, if applicable, note if activities are dependent on other project milestones (e.g., following specific events) or will happen multiple times (e.g., "June 2024, December 2024, February 2025"). Remember that the final evaluation report must be submitted by the end of the project, so plan timelines accordingly. Be as specific as possible, recognizing that timelines and details may evolve as the project progresses. Refer to the provided* ***sample table*** *for guidance.*

|  |  |  |
| --- | --- | --- |
| **Anticipated Evaluation Activity** | **Details** | **Anticipated Timeframe** |
| **Develop and refine evaluation plan** | Create a detailed evaluation framework, including goals, metrics, and methodology | Mar - April 2025 |
| **Develop data collection tools** | Design surveys, interview guides, and request templates for administrative data collection | May - Jun 2025 |
| **Collect data** | Distribute surveys  Conduct interviews  Request administrative data | Jul 2025 (post-intervention); Dec 2025; Feb 2026 (midpoints) |
| **Analyze data** | Review survey results  Transcribe and analyze interview data  Evaluate trends | Aug - Sep 2025; Jan 2026; Mar 2026 |
| **Draft and complete evaluation final report** | Compile findings, align with project objectives  Finalize report for submission | April to May 2026 |

**Planned Completion Date**: May 31, 2026

# Evaluation Matrix

Use this evaluation matrix to evaluate the planning, implementation and outcomes of the project. For each evaluation question, identify related sub-questions, key indicators, and expected outcomes. Specify data sources, methods, and measures to guide data collection and assessment. Use the example row as a reference for completing each section accurately and consistently. For access to the Shared Care Shared Measures Reference Guide, please see the Evaluation Planning Toolkit on the [Shared Care Learning Centre](https://sharedcarelearningcentre.ca/evaluating-monitoring/%20.).

**Process Evaluation**

|  |  |  |  |
| --- | --- | --- | --- |
| **Associated Evaluation Question** | **Associated Sub-Questions** | **Key Indicators** | **Suggested Data Source/Method** |
| **How was the initiative planned and implemented?** | What structures/processes are in place to guide and support the project?  Have the appropriate partners been engaged? And how have they been involved? | Existence and effectiveness of governance structures    Number and type of engaged partners | Project governance documents  Meeting attendance records  Interviews or surveys with partners |
| **What was implemented over the course of the project?** |  |  |  |
| **What lessons were learned, including strengths, challenges and opportunities for improvement?** |  |  |  |

***Outcome Evaluation***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Associated Evaluation Question** | **Shared Care Outcomes Selected** *(From proposal. Add rows as needed)* | **Key Indicators** *(highlight relevant Shared Care Shared Measures)* | **Alignment with IHI Quintuple Aim** | **Suggested Data Source/Method** |
| **To what extent has the project achieved it’s intended outcomes?** | SCC1 – Improved patient care and health outcomes |  | Improved patient health outcomes  Improved patient experience | Patient survey |
| SCC2 – Improved patient ability to self-manage care |  | Improved patient health outcomes  Improved patient experience  Reducing cost to health care system/improved sustainability |  |
|  |  |  |  |

# Logic Model

*A logic model can be helpful in showing how a project’s activities and outputs connect to the intended outcomes.*

(Optional)

**\*\*\*End of Document\*\*\***