



Case study example: The *Health Connect* evaluation plan

Evaluation Question	Indicator(s)	Data Source	Data collection method	Person/entity responsible	Timeline/frequency
Process (activity): To what extent has an effective referral process been established?	<ul style="list-style-type: none"> Formal data sharing agreements established Written and agreed upon process and system for referrals (e.g., flow chart, person responsible, process for referrals) Completed at least 2 PDSA (plan-do-study-act) cycles to assess effectiveness after been implemented 	Program documents (e.g., agreements, PDSA documentation)	Document review	CHW partner organizations	<ul style="list-style-type: none"> Agreements and PDSA cycles in first 6 months Agreements monitored & updated annually
	<ul style="list-style-type: none"> CHW & champions at key organizations report that the referral process is effectively working 	CHW & partner organizations	CHW/partner Interviews	Partner organization staff member	<ul style="list-style-type: none"> Interviews annually
Process (participation): Who has been served through the CHW program?	<ul style="list-style-type: none"> # of unduplicated clients served # of encounters Demographics of clients served (age, gender, race/ethnicity, income, education) 	Program documents: intake forms, schedules, and client list	Document review		
Outcome (short term): To what extent have clients established self-management goals and action plans?	<ul style="list-style-type: none"> #/% of clients that have established self-management goals #/% of clients that have established action plans 	Client records	Document review	CHW	Monthly compilation
	<ul style="list-style-type: none"> Client perception that self-management goals & action plans are appropriate, useful and achievable 	Clients (sample)	Client interviews (n=10 quarterly)	Partner organization staff member	Quarterly
Outcome (intermediate): To what extent have clients improved their health behaviors related to healthy eating and physical activity?	<ul style="list-style-type: none"> Improvement in client self-report behaviors around healthy eating and physical activity 	Clients	Survey collected every 6 months for each client	CHW	Ongoing, rolling timeline
	<ul style="list-style-type: none"> Client perception that improvements have been made 	Clients (sample)	Client interviews (n=10 quarterly)	Partner organization staff member	Quarterly
	<ul style="list-style-type: none"> CHW perception that improvements have been made & success stories 	CHW & partner organizations	CHW/partner interview	Partner organization staff member	Annually
Outcome (long term): To what extent have clients' improved health outcomes related to diabetes?	% of clients that have had a CHW visit within the past 12 months and had: <ul style="list-style-type: none"> blood sugar in control ($A1c \leq 9$) blood pressure in control ($BP \leq 139/89$) BMI ≤ 25 	Electronic Health Records (EHRs) at the clinic	EHR report queries	Data analyst at clinic	Report pulled at baseline, quarterly, and at end of program