DATA COLLECTION, TRACKING, & EVALUATION

NaRCAD's FAQs

Evaluation needs to be considered early on in your program planning, even before materials are developed and the intervention is implemented. Review your evaluation goals often and refer to this document throughout your planning process.

✈ GETTING STARTED

1. **Why do I need to evaluate my program?**
   - Evaluation is helpful to show your academic detailing (AD) program's impact. It's also a way to build the case for continued funding and sustainability.
   - It may be difficult to ensure that your program will continue to be funded if you aren't able to prove the program's quality and/or effectiveness.

2. **I thought there were research studies proving academic detailing to be an effective strategy. Doesn't that mean my AD program will also be effective?**
   - AD has been proven to be an effective clinician education strategy, but that doesn't mean every AD program is effective.
   - Many programs conduct applied program evaluations, which focus on the quality of *implementation and process outcomes* to assess for fidelity to the research-based model.
   - Some programs conduct research evaluations, which are often used for studying new innovations in AD and require significant resources.

3. **How do I know what to evaluate?**
   - Start by working backward *(refer to NaRCAD's EVALUATION QUICK REFERENCE GUIDE to learn more)* from your anticipated evaluation outcomes and intended audiences.
   - Understand the goals of your stakeholders in order to figure out which outcomes are most important to include.
   - Decide what data you should collect and analyze based on your priority outcomes.
     - For example, if you're looking to increase PrEP prescriptions in your community, try to collect prescribing data from your jurisdiction before and after your detailing campaign. If you cannot get access to prescribing data, then an alternative measure like clinician self-report of willingness to prescribe PrEP could serve as a proxy measure.

4. **How much time should my team expect to spend preparing for an evaluation?**
   - The amount of time your team needs to spend on preparing for an evaluation is context specific. You'll want to spend time thinking about the resources you have or need with your team. You'll also want to pilot the data collection and evaluation process before beginning a larger evaluation.

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5. **Who is in charge of managing the evaluation process?**
   - Meet with your team early on to decide who will lead the evaluation process. Sometimes the person who is managing the process is the same person as the one who is conducting the program evaluation.
   - If you're managing the evaluation process, be sure to create a timeline with deliverables to share with your team so everyone can stay on track.

COLLECTING DATA

1. **What type of data should I collect?** *(refer to NaRCAD's DATA COLLECTION & TRACKING QUICK REFERENCE GUIDE to learn more).*
   - Your targeted outcomes for evaluation should guide your collection of detailing visit tracking data.
   - Many times, programs will collect detailing visit tracking data. Examples of visit tracking data include:
     - **Demographic Data:**
       - *Name of clinician*
       - *Clinical site and type of practice*
       - *Address*
       - *Email*
       - *Phone number*
       - *Date of contact*
     - **Detailing Visit Data:**
       - *Method of outreach*
       - *Length of visit*
       - *Key messages covered*
       - *Barriers*
       - *Commitment to behavior change*
       - *Follow-up visits*
   - Some detailing programs also measure knowledge, attitudes, and beliefs of the clinicians they are detailing via surveys. This type of data can be collected before and after a visit or at different intervals following a visit.

2. **Should I collect quantitative or qualitative data?** *(refer to NaRCAD's EVALUATION QUICK REFERENCE GUIDE to learn more).*
   - You can collect quantitative or qualitative data depending on your program's access to existing data and/or capacity to collect data.
     - **Quantitative data is:**
       - Structured and better suited for statistical analyses
       - Can provide objective measurement of some outcomes
       - Easier to present in graphs or charts
     - **Qualitative data is:**
       - Less structured, and difficult to analyze statistically
       - Provides information to gain a deeper understanding of opinions, motivations, and attitudes

- Can be presented as quotes from interviews, focus groups, or detailing visits
- Don't underestimate the power of storytelling and narrative with qualitative data, especially when presenting results from detailing visits to stakeholders. Qualitative data adds a human element to your evaluation that isn't captured with quantitative data.

3. **What platform should I use to track process data** *(e.g., method of outreach, length of visit, key messages covered, barriers, commitment to behavior change, follow-up visits, etc.)***?**
   - Many AD programs use a Word document or Excel spreadsheet to track visit data while others use platforms such as:
     - Salesforce
     - REDCap
     - Smartsheet
   - For clinician surveys, programs often use:
     - Google Forms
     - Survey Monkey
     - Qualtrics

EVALUATING DATA & PRESENTING OUTCOMES

1. **Who should analyze my data?** *(refer to NaRCAD's EVALUATION QUICK REFERENCE GUIDE to learn more).*
   - Consider who is on your team and their specific skillsets *(e.g., prior experience analyzing data).*
   - Often, internal team members with excellent organizational and verbal skills, experience with collecting and analyzing data, or experience writing final evaluation reports can assist with an evaluation.
   - For programs without these skillsets within their team, consultants from academic institutions or public health departments can be hired.

2. **How should I present my findings?**
   - Think about the intended audience for your analyses and tailor your approach.
   - Most programs use a final report format. If applicable, review what you agreed upon with your stakeholders about presenting findings. For more complex reporting, please reach out to the NaRCAD team for support.
   - Include as many visuals as possible and make sure to include stories from the field.
   - Many programs create graphics internally by using templates from platforms such as:
     - Canva
     - Piktochart
     - PowerPoint
   - You don't need to be an expert in graphic design to present your findings in a concise and clear way.

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Please reach out to the NaRCAD team at narcad@bmc.org with additional data collection, tracking, and evaluation questions.