

# How to Become an Evaluation Champion and Win People Over

AREB Coffee Breaks 2021

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Centers for Disease Control and Prevention  
National Center for Chronic Disease Prevention and Health Promotion

Division for Heart Disease and Stroke Prevention



## MODERATOR:

Welcome to today's Coffee Break presented by the Applied Research and Evaluation (ARE) Branch in the Division for Heart Disease and Stroke Prevention at the Centers for Disease Control and Prevention.

We are fortunate to have **Michael Schooley and Aysha Rasool** as today's presenters. **Michael is the Branch Chief for the Applied Research and Evaluation Branch** within CDC's Division for Heart Disease and Stroke Prevention. **Aysha** is an ORISE Fellow on the **Applied Research and Evaluation Branch** within CDC's Division for Heart Disease and Stroke Prevention.

My name is **Allison White**, and I will be acting as today's moderator. I am an **ORISE fellow** within the **Applied Research and Evaluation Branch**.

## Before we begin...

- All phones have been placed in SILENT mode.
- Any issues or questions?
  - Use Q & A box on your screen
  - Email [AREBheartinfo@cdc.gov](mailto:AREBheartinfo@cdc.gov)



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MODERATOR:

Before we begin, we have a few housekeeping items.

All participants have been muted; however, to improve audio quality, please mute your phones and microphones throughout the presentation unless prompted.

If you are having issues with audio or seeing the presentation, please message us using the chat box feature at the bottom of your screen, or send us an email at [AREBheartinfo@cdc.gov](mailto:AREBheartinfo@cdc.gov)

If you have questions during the presentation, please enter it into Q/A feature found at the bottom of your screen. The presenters will address any questions at the end of the session.

Since this is a training series on applied research and evaluation, we hope you will complete the poll at the end of the presentation and provide us with your feedback.

## Disclaimer

The information presented here is for training purposes and reflects the views of the presenters. It does not necessarily represent the official position of the Centers for Disease Control and Prevention.

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So, without further delay. Let's get started. **Aysha and Michael**, the floor is yours.



Thanks, Allison. My name is Aysha Rasool and I am an ORISE Fellow in the Applied Research and Evaluation Branch. I work closely with the Evaluation and Program Effectiveness *and* the Applied Research and Translation teams within the branch.

In today's presentation, I will first give an overview of the Applied Research and Evaluation Branch within the Division for Heart Disease and Stroke Prevention, and then will shed light on why evaluation is important. For the remainder of the presentation, I will turn it over to Michael to explain how you can prepare for evaluation and effectively champion evaluation. We will then close out with Q&A and a brief poll.



## ABOUT THE APPLIED RESEARCH AND EVALUATION BRANCH

\*Section header



## **Who We Are**

A center of excellence with a diverse workforce that values all voices and perspectives.

## **What We Do**

We lead and implement program evaluation, applied research, research translation, and public health economics research to support the prevention and management of cardiovascular disease while assuring the advancement of health equity.

## **How We Can Help**

We work collaboratively with diverse partners to inform evidence-based practice, build practice-based evidence and evaluate CDC-funded programs.

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The Applied Research and Evaluation Branch within the DHDSP was established about 15 years ago as a center for excellence for evaluation practice and service. We lead and implement program evaluation, applied research, research translation, and public health economics research to support the prevention and management of cardiovascular disease while assuring the advancement of health equity. We work with diverse partners to inform evidence-based practice, build practice-based evidence and evaluate CDC-funded programs.

## Support to Heart Disease and Stroke Initiatives

### Cooperative Agreements

- DP18-1815: Improving the Health of Americans
- DP18-1817: Innovative State and Local Public Health Strategies
- DP15-1514: Paul Coverdell National Acute Stroke Program
- DP16-1607: Sodium Reduction in Communities Program
- DP18-1816: WISEWOMAN
- DP19-1907: Mississippi Delta Health Collaborative
- DP19-1903: Good Health and Wellness in Indian Country

### Initiatives

- Million Hearts®

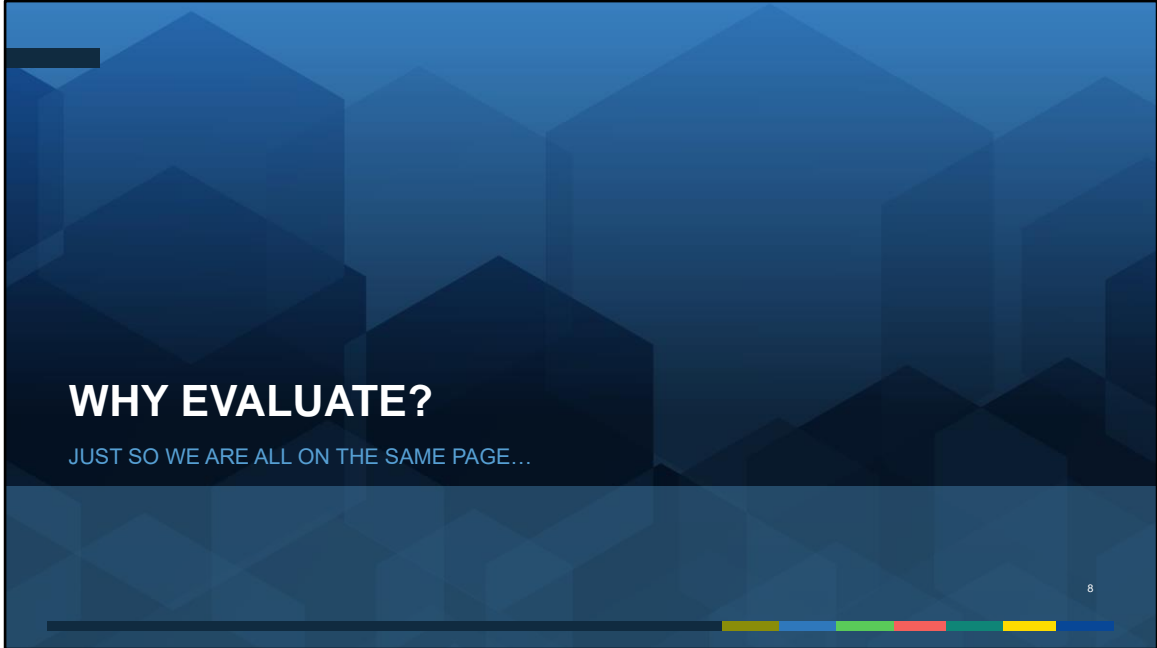
### DHDSP Programs

- GIS Program

[HTTPS://WWW.CDC.GOV/DHDSP/PROGRAMS/INDEX.HTM](https://www.cdc.gov/dhdsp/programs/index.htm)

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On this slide are some of those CDC-funded programs that our evaluation team supports. These include cooperative agreements, initiatives, and our division programs. You may be familiar with some of these and may even be one of our funded recipients! Evaluation of our national programs is essential because we want to be able to achieve the short, intermediate and long-term outcomes of each program's goals for advancing public health, all while documenting progress and setbacks along the way.

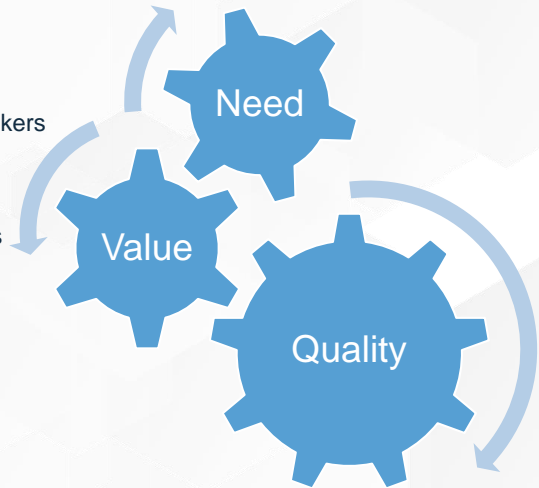


Building evaluation capacity takes time, and even though we've been working on it for many years now, it's an ongoing process and somewhat of a balancing act. To help convince decision makers it is important to remind ourselves why we need to evaluate and the benefits we reap from it.



## Why Evaluate?

- Demonstrate impact to funders and decision makers
- Document progress or effectiveness
- Identify and examine strengths and weaknesses
- Foster a culture of learning and betterment



A first step to addressing some of the concerns from the previous poll is to ask yourself, “Why do I need to evaluate my work?” Simply put, evaluation is an opportunity **to demonstrate impact to funders and decision makers.**

What you may be most familiar with is that evaluation is also **a means of documenting progress or effectiveness.** It is the steppingstone that can bring you closer to achieving your program goals through assessment of outcomes and impact. Documentation of progress towards performance metrics provides the data points that will: **1) demonstrate needs/gaps, 2) illuminate valuable components of a program and 3) demonstrate the quality of the activities and processes used to achieve programmatic success.** [short pause]

Evaluation also serves the purpose of **pinpointing and examining program strengths and weaknesses** and in turn, introduce opportunities to save resources and strengthen what’s most effective.

Last, but not least, the process of evaluation can create a culture of learning and betterment in your organization.

So, how can you demonstrate to decision makers and funders that you need their support for evaluation? By becoming an evaluation champion, of course! I'll pass it over to **Michael** to explain more.



Thank you **Aysha**. I'm going to talk a bit more about our experience building evaluation capacity and championing evaluation.



## Preparation for Evaluation Support

- You may already be doing evaluation
- Allow for time and effort
- Be adaptable and flexible
- Bring everyone to the table, not just evaluators

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To start, I want to share some ways that you can prepare your program for evaluation support.

**First**, it is important to recognize that you may already be doing evaluation without calling it so. Your program collects data, but what's crucial is how that data is utilized to inform programmatic activities. When I first started working in program evaluation, I was an epidemiologist, and the epi data was highly valued in our organization. So, focusing on how the epi data could be better interpreted and used for evaluation helped ease the introduction of evaluation into our program and for decision-makers.

**Second**, recognize that it will take time and effort to plan, revise, and execute an evaluation. So, it is important to allow for adequate time, but also don't wait until the evaluation is completed to share information and results. Prepare informational updates or interim reports that can be shared with decision-makers, because we know that everyone isn't willing to wait for final results from an evaluation.

**Third**, evaluation can be a messy, iterative process. Evaluation should be grounded in sound methodology, but you also need to be flexible and often adapt to changing situations. Evaluators should come with an innovative mindset and also be aware of

how to build on past successes and lessons learned. An important point here is right-sizing the evaluation methods and approach to the needs and expectations of the organization and decision-makers.

**Lastly**, bring decision-makers and partners to the table. It's important to engage various perspectives and help generate buy-in for the evaluation. Obviously, this can't literally be "everyone," but folks can be engaged in various ways and roles. For instance, some partners might just be engaged in an active way to provide input, advice or services, while others might just receive informational updates about the evaluation.



## Characteristics of an Effective Champion

- Maintains a holistic view of evaluation, translation, and implementation
- Collaborative
- Willing to share best practices
- Service-oriented
- Adaptable to organizational systems and culture
- Strong communicator

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So, what are some of the characteristics of an evaluation champion?

First, you have to see the value in evaluation and how it relates to program implementation, monitoring, and improvement, as well as helping to effectively translating research to practice. The more dots you can connect evaluation to, the better chance you have of decision-makers and colleagues understanding it and seeing value in it.

Evaluation champions are **highly collaborative** and listen to others' ideas, which is crucial to building trust and buy-in. They develop perspective, knowledge and competence, **share best practices** with others and have a **service-oriented attitude**. This means looking for ways that evaluation can be helpful in providing useful information or answering important questions.

Another important characteristic of an evaluation champion is **adaptability**. Champions learn their organizational systems and culture to identify ways that evaluation can adapt and fit into the organization and be valued. Knowing communication etiquette and style is also part of being a **strong communicator** and champion.



## Characteristics of an Effective Champion

- Advocates for ethical and scientific process
- Action-oriented
- Opportunistic
- Product-oriented

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Evaluation champions advocate for the **ethical and scientific process** and seek opportunities to strengthen and develop the evaluation so that it is both rigorous and practical. Striking this balance is critical to right-sizing the evaluation to fit your needs and the needs of your organization and decision-makers. Sometimes a very practical and quick evaluation is needed to help provide information for decision-making, while other times a more rigorous and longer evaluation is needed.

It's also important to prepare proactively, particularly with respect to resources, and be ready to take **action** when **opportunities** arise. This can include looking for ways to advance evaluation work and having proposals ready if there is an opportunity for additional resources or to brief leadership on your evaluation efforts and plans.

Lastly, it's good to be **product-oriented** and have something to show for the organizational investment in evaluation. Products can take many forms, such as detailed evaluation reports, journal articles, brief documents, or infographics.



## Winning others over, influence people, making friends

- Building network
- Developing rapport
- Recruit more evaluation champions
- Understand values and intentions and share your own.

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I'll close by talking a little about how you use these characteristics to help win over decision-makers and partners to effectively champion evaluation. Of course, these days winning people over and making friends includes good practices like washing your hands, wearing a mask, maintaining social distance and getting vaccinated! But, in all seriousness, the current virtual environment does have an impact on how we approach some of these things, but the key points are the same.

A key strategy is **building a network and developing rapport** with the decision-makers. It is advised to not only collaborate but **relate** using shared experiences to develop rapport. This takes an investment of time and also looks different in our current environment. For instance, when I would have problems with decision-makers seeing value in and supporting evaluation, I would sometimes have to invest additional time in just basic rapport-building, get to know each other, start to build trust, to understand different perspectives and what is valued. Over time, this can result in more support for evaluation, particularly from decision-makers who may start out as unsupportive or not see the value in evaluation.

It's also good to **recruit more evaluation champions**, so that you have different voices and perspectives supporting evaluation and build a culture of evaluation



support. For instance, some decision-makers may respond differently to different voices or people, so it's good to have more than just one person or voice supporting and trying to champion evaluation.

Next, in order to be an effective influencer, evaluators need to construct evaluation services to deliver on **organizational values** & follow organizational standards for rigor and methods and meet organizational expectations. I've mentioned this notion before, and it really speaks to right-sizing the evaluation within your organization.



## Winning others over, influence people, making friends

- Clarity in data
- Share progress and results
- Engage external experts

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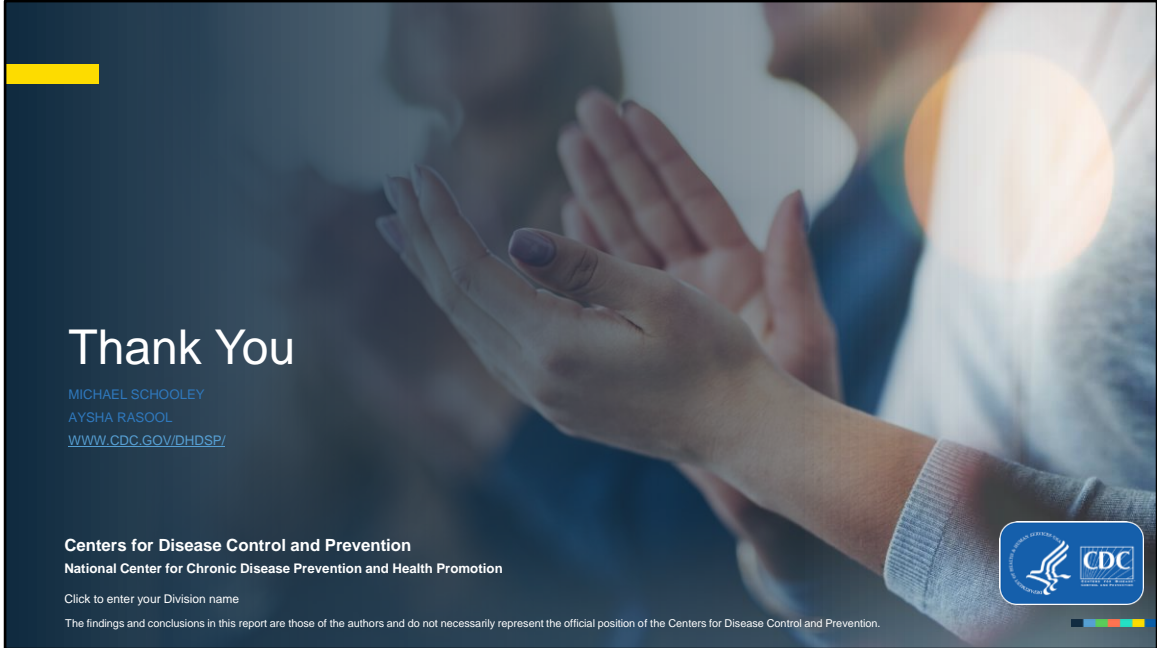
It's also important to make sure that program leadership/decision-makers and funders **understand the data** and that there is no misinterpretation of findings or results. This might mean thinking about ways to simplify the data and using data visualization to communicate findings.

It is also crucial to **share progress and results** regularly and sometimes change up the approach for variability and to keep interest. As I mentioned earlier, examples might include standard evaluation reports, but also the use of infographics, briefs, and snapshots. Mainly, it's important to share early and share often.

Lastly, if your leadership won't listen to your voice or other voices within your organization, it may be helpful to bring in other **external experts** to advocate on your behalf. This can include experts in the field, partners, and even funders who might be engaged in an advisory or consultative capacity that could be one-time or ongoing. For example, some programs have standing evaluation advisory groups, who can provide input on evaluation and help validate evaluation approaches and findings.

In closing, a fundamental component of championing evaluation begins with an awareness of organizational values, building relationships, and relentlessly promoting

evaluation. We hope that you are already an evaluation champion or become one soon!



MODERATOR:

At this time, we'll take questions, but first we'll check to see if any questions have come in through the Q&A box.

**\*If we have questions ask the questions posed by the attendees to the presenter\***

Q: What action steps would you recommend to programs that don't have the resources (financial or personnel or time) to conduct rigorous evaluations of their programs?

A: First, I would recognize that every organization is in a different place and has different resources, and therefore knows what approach is the best for them. As I mentioned earlier in the presentation, you may already be doing evaluation activities without realizing it and simply just need to channel those processes into something systematic. Start small and start by building rapport and sharing everything that evaluation can do (like save money and time). It will take a little extra time to assess the efficiencies but in the same vein, that might open-up time to dig deeper and build capacity for your organization.