

# Part 2: Evaluation Readiness Checklist

Use the checklist below to determine whether the needed resources, goals, plan for IRB approval, workplan and stakeholder buy-in are in place to evaluate a data linkage project.



## Resources

### Dedicated staff

- Select an evaluation lead who can design the evaluation, create, and manage an evaluation plan, create data collection tools and guidance, manage data collection and analyses, and oversee the presentation of evaluation results.
- Identify administrative support to help coordinate with stakeholders, schedule meetings, organize files for IRB submission, track receipt of data, and format presentation documents.

### Trained staff

- Train evaluation staff on the data linkage project goal(s) and approach.

### Collaboration time

- Plan for evaluation staff to meet with the project team for consultation and collaborative work over the course of the project.

**If your agency does not have staff bandwidth for an evaluation, consider hiring a graduate level student intern to take on the evaluation as a school practicum. A team approach where evaluation work is divided among team members may also be more practical.**

### Project goals and objectives

- Define the problem the project is trying to solve. This should be done in collaboration with stakeholders, including experts with knowledge of relevant data systems and data use.
- Clarify, in collaboration with stakeholders:
  - i. What specific change(s) the project wants to accomplish?
  - ii. What change can be realistically achieved?
  - iii. By when?
  - iv. How can progress be measured?

### Evaluation goals and objectives

- Determine what evidence to use (i.e., data, data sources) and how to use it (i.e., methods) to answer the question: *Have the goals and objectives of this project been met?*



## Clear goals



### Plan for IRB approval

#### Requirements

- Determine whether you will collect or access Protected Health Information (PHI) or Personally Identifiable Information (PII). (If yes, you may need IRB approval to proceed)
- Determine, with your IRB administrator, whether evaluation activities require IRB approval.

#### Plan

- If IRB approval is required, develop an IRB protocol or package per the requirements of your selected IRB.

#### Timing

- Plan to obtain IRB approval before evaluation activities begin



### Work Plan

- Create an evaluation work plan that defines project goals, objectives, evaluation goals and questions, methods, and anticipated timeline.**
- Include key milestones and a realistic timeline considering the overall project plan. (The GU Implementation Guide and [BetterEvaluation](#) provide examples of a Gantt chart that can be used for this purpose)**



### Stakeholder buy-in

- Obtain early consensus for conducting the evaluation, as well as the key milestones and the timeline, from leadership at every agency or stakeholder who will participate in the linkage project.**
- Plan to maintain regular updates to stakeholders on evaluation progress through project implementation.**