

Strategy Evaluation

Description:

This tool provides two checklists and a diagram that can guide the evaluation of a strategy.

How it can be used:

Within organizational strategies, the area most often neglected is the evaluation stage. Monitoring and measuring progress and results are critical to the successful implementation of a strategic community health plan.

Organizations need to undertake a formal process to evaluate their strategies.

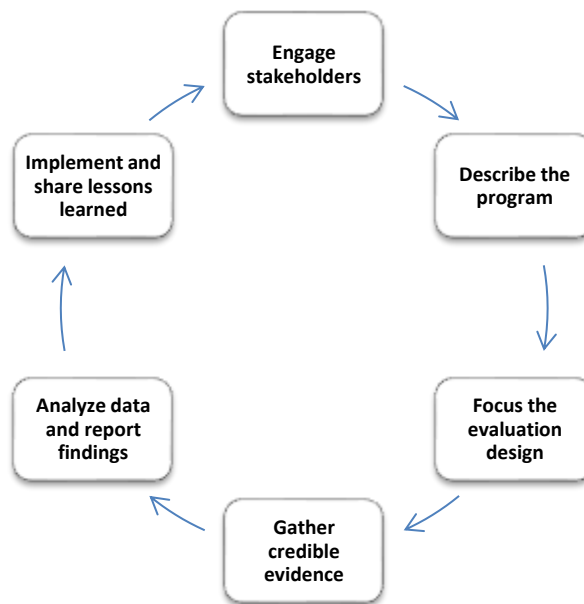
- Once approved, transform your strategic plan into activity plans upon which each program/service area will report. Include actions and time frames.
- Add a standing item to meeting agendas that provides an update on the measurement of results to date. This regular reporting activity supports accountability and is a key element in performance evaluation.
- Provide ongoing feedback and take corrective action when and if it is required. Often, waiting for the next planning exercise is not effective or prudent.

Boards need to monitor 'the actual' versus 'the anticipated' results of all the organization's strategies. Go through the checklists and, if necessary, revisit your strategy to ensure it is appropriate and conforms to your plans. Take corrective action quickly.

Evaluation of Strategy Questions	NO	YES	What action is required?
Have major changes occurred in the organization's internal strategic position? (e.g., achieved Accreditation status)			
Are internal strengths still strengths?			
Have we added new internal strengths? If so, what are they?			
Are internal weaknesses being addressed?			
Do we have new or other internal weaknesses that are not being addressed? If so, what are they?			
Have major changes occurred in the organization's external strategic position? (e.g., new affiliation with provincial facility)			
Are external opportunities still opportunities?			
Are there new external opportunities? If so, what are they?			
Are external threats still threats?			
Are there new external threats? If so, what are they?			
Has the organization progressed satisfactorily toward achieving its stated strategies or performance indicators?			
Is the strategy consistent internally and externally?			
Is the strategy appropriate in view of available resources?			
Does the strategy have an appropriate time framework?			
Does the strategy involve an acceptable degree of risk?			
Is the strategy workable?			

Steps of Evaluation

1. Determine your key stakeholders and involve them in the evaluation process.
2. Describe the strategy you want to evaluate.
3. Design your evaluation plan and develop an action plan to carry it out.
4. Obtain the data you need to answer your evaluation questions.
5. Analyze your data and report your findings.
6. Integrate evaluation results into programs/services



Prepare for the evaluation by asking the following questions.

Utility: Who needs the evaluation results? Will the evaluation provide relevant information in a timely manner for them?

Feasibility: Are the planned evaluation activities realistic given the available time, resources, and expertise?

Propriety: Does the evaluation protect the rights of individuals and protect the welfare of those involved? Does it engage those most directly affected by the program, such as participants and their families?

Accuracy: Will the evaluation produce findings that are valid and reliable, given the needs of those who will use the results?