

Chapter 5



Evaluating Your Outreach Efforts

5. EVALUATING YOUR OUTREACH EFFORTS

In This Section

The information and tools in this section are meant to help your team conduct a straightforward, “real world” evaluation of your provider outreach efforts. Topics covered include:

- Asking the right questions to learn how your outreach activities are working
- Assessing the level of effort spent contacting PCPs and office staff
- Asking class participants how they heard about the class they signed up for
- Preparing a summary report of your experience and the effectiveness of your approach
- Using the evaluation tools

EVALUATING PROVIDER OUTREACH: A REAL WORLD APPROACH

Evaluating provider outreach will help you and your marketing team see what impact your efforts have had in getting participants into the interventions you are promoting through outreach to PCPs. It also helps you identify ways to refine and strengthen your efforts. Use what you learn from your evaluation to:

- Find strengths to capitalize on and ways to improve
- Focus on what works and fix or discontinue less fruitful activities
- Demonstrate effort and success for potential partners and funders

Conducting an evaluation may seem daunting, but it doesn't have to be. The information and tools provided in this toolkit are meant to help your team find out what you need to know without a lot of extra work or a need for outside consultants. Here are some strategies for getting started.

- **Plan early.** Begin thinking about evaluation before you contact providers. Planning evaluation activities early can help ensure that you have defined what “success” means (e.g., how many participants attend classes on the recommendation of a provider you contacted) and that evaluation logistics are in place ahead of time (e.g., participant feedback forms are in instructors' hands before classes start).

- **Determine what you want to learn.** What do you want to find out about your provider outreach efforts? Use the following four questions as a guide:
 1. How are the logistics of provider outreach working?
 2. How many class participants learned about the intervention from their providers?
 3. How many participants received a recommendation from a provider you contacted?
 4. What have you and your colleagues learned that might help future outreach?
- **Prepare your evaluation tools.** Document the answers to the four questions using the tools in **Appendix E**. Electronic versions of these tools in Microsoft Word and Excel formats can be downloaded from www.cdc.gov/arthritis/interventions/marketing-support/1-2-3-approach.

This section gives you an overview of the key questions and tools for evaluating provider outreach. We encourage you and your marketing team to customize and expand upon the tools and guidance provided here as needed to accommodate your efforts.


ASSESSING YOUR LEVEL OF EFFORT

This part of the evaluation shows you how much effort your program spent on provider outreach. This information will help you make judgments about what benefits your efforts have yielded, how you can be more efficient, and which PCPs to target in the future. This is where the information you've collected on the Provider Outreach Tracking Spreadsheet comes in handy. You can use it to:

- Gauge your team's level of effort. Look at the information you've tracked such as the number of practices you contacted, how many total contacts you or your team made, and what types of contacts (e.g., phone, e-mail, drop-off visit).
- See which practices yielded the most class participants. Think about the qualities of the outreach activities and the practice itself that made it possible. This knowledge can help you tailor future outreach.
- Understand the logistics of outreach by reviewing staff notes. Use the information to improve and simplify logistics in future efforts.

We recommend reviewing the spreadsheet data (and all of your evaluation data) at least once a year, or after the spring or fall season of classes. Compile what you learned in a year-end report to share with staff, partners, and funders.

ASKING PARTICIPANTS, "HOW DID YOU HEAR?"

One way to find out how many people participated in a self-management education workshop or physical activity class based on their providers' suggestion is to ask. Capture this information to better gauge the role of provider input. Many people are accustomed to forms like these for programs, classes, and events; moreover, many local classes already have registration processes and forms in place. The **How Did You Hear? Form** should be easy to integrate into the process and materials currently in use. You can use the Word document provided in **Appendix E** as a standalone questionnaire, or you can cut and paste the questions and answer options into existing class registration forms.  See Figure 5.1 on page 51.

The How Did You Hear? Form asks participants to tell you two things:

1. How they heard about the class—for example, from family or friends, another class participant, their doctor's office, or a community leader.
2. If they heard about the class from a doctor's office, which one. The form asks participants to name the doctor or clinic and note which person actually mentioned the class—for example, a doctor, other staff member, or person in the waiting room. This question may help you understand the recommendation process at the practices you visit.

To administer the How Did You Hear? questions and manage the information collected, follow these steps.

1. Tell class instructors about the How Did You Hear? Form and why you want to ask these questions. Emphasize the importance of collecting the information early—during either registration or participants' first class visit, if possible. The goals are to learn what got people to come to the class, not necessarily whether they completed their sessions or even what they thought about the class.
2. Provide print or electronic copies of the How Did You Hear? Form to instructors so they can administer the forms or add your questions to their existing forms. Pre-load the class information (class name, location, and start date) in the box in the upper right corner of the document, and add your logo in the space in the bottom right corner. For classes being conducted in Spanish, make sure instructors have copies of the Spanish language version of the questionnaire.
3. Set a clear and easy-to-follow plan for instructors to return completed forms to you. Offer a self-addressed stamped envelope, for example, or give your fax number. Make a list to keep track of which instructors have sent their participant input and send reminders to those who have not done so within 2 weeks of starting the class.

Figure 5.1 How Did You Hear? Form

How Did You Hear About Us?

Class Name _____
Start Date _____
Location _____

How did you hear about this class? Check all that apply.

- A friend, family member, or coworker
- Someone who took the class before
- Someone who teaches this or other community classes
- A doctor's office of any kind, like a medical practice, HMO, hospital, or community clinic.
IF YOU CHECKED DOCTOR'S OFFICE, GO TO NEXT QUESTION
- A community or church/synagogue leader
- A brochure, flyer, poster, or other printed material **NOT** from a doctor's office
- A story or ad on radio or TV, or in a newspaper
- A website
- Don't know or don't remember
- Other source **SPECIFY** _____

4a. What's the name of the doctor or clinic?

4b. Who in the doctor's office told you about the class? Check only one answer.

- Doctor
- Other clinical staff, like a nurse or PA
- Front desk or administrative staff
- Someone in the waiting room
- Other staff
- No person—just a brochure, flyer, or poster

LOGO
HERE

Callout boxes:

- All participants answer the Main Question and check all responses that apply.
- You or the instructor enters class name, start date, and location.
- Respondents who learned about the class from a doctor's office also answer Response 4a Followup and Response 4b Followup.



TIP ▶ If instructors incorporate your questions into their own forms, ask them to clearly mark the class name, start date, and location on the form so you can effectively evaluate your outreach.

- Assign staff to review the How Did You Hear? Forms and transfer the respondents' answers to the **How Did You Hear? Data Entry Spreadsheet** (available in **Appendix E**). **See Figure 5.2 on page 52 or details.**
- Review the data. You'll find that the How Did You Hear? Data Entry Spreadsheet can help you assess:
 - How many people in your community are learning about self-management education and physical activity classes from each of several sources, including from a medical practice.
 - Which medical practices are recommending that people take the classes. You can match the findings against your Provider Outreach Tracking Spreadsheet to see whether they are practices you targeted.
 - What sources within a practice are most likely to give recommendations.

We recommend reviewing the data on this spreadsheet

(and all of your evaluation data) at least once a year or after the spring and fall season of classes. Compile what you learned in a year-end report to share with staff, partners, and funders. Be aware that not all participants will be able to reliably report how they heard about the class they signed up for. The How Did You Hear? information can help gauge how your outreach efforts are going, but make sure you have other sources of information about recommendations made to get a more complete picture.



TIP ▶ When transferring responses to questions on the How Did Your Hear? Form that only require checking a box (i.e., the Main Question and Response 4b Followup, you can enter a number, letter, or other character in the corresponding field in the How Did You Hear? Data Entry Spreadsheet. When all your responses have been entered, use the Excel COUNTA function to tally results.

Figure 5.2 Transferring Data to the How Did You Hear? Data Entry Spreadsheet

1-2-3 APPROACH
Arthritis Toolkit

How Did You Hear? Data Entry Spreadsheet

Participant # or ID	Main Question: How did you hear about this class?										Response 4a Followup: Name of Practice			Response 4b Followup: Who told you about the class?									
	1	2	3	4	5	6	7	8	9	10	Targeted/Not Targeted												
	Friend, family, someone	Someone who was at the class	Someone who brought class	Doctor's office	Community leader/organization	Brochure, flyer, poster	Radio, TV, newspaper	Website	Don't know/remember	Other source	10 Specify	T	NT	UNK	1	2	3	4	5	6			
1																							
2																							
3																							
4																							
5																							
6																							
7																							
8																							
9																							
10																							
TOTALS	1	2	3	4	5	6	7	8	9	10	ALL RESPONSES				T	NT	UNK	1	2	3	4	5	6

See instructions tab for tips on filling out this spreadsheet and inserting formulas to calculate sums.

For Response 4b Followup (Who in the doctor's office told you about the class?), there should only be one answer for each respondent.

Mark all answers to the Main Question (How did you hear about this class?) in this section of the spreadsheet. Put all responses for a single respondent on the same line.

For Response 4a Followup (What's the name of the doctor or clinic?), type in the name of the practice as the respondent wrote it on the form.


SUMMARIZING YOUR EXPERIENCE

Put together a brief summary of successes and lessons learned conducting provider outreach. Preparing this type of report gives you an opportunity to think about the strategies you used in your outreach work, assess their effectiveness, and refine future efforts. Your organization may have set guidelines for evaluation reporting responsibilities. If not, consider reviewing your tracking and evaluation data and preparing a brief report at least once a year. You can share this report with:

- Marketing staff to help refine your outreach activities
- Decision-makers in your organization to validate your efforts and secure buy-in and resources
- Potential funders to show the value of underwriting a provider outreach program
- Community partners and leaders to encourage a wider base of local support and amplify the reach of your messages
- Providers to pique their interest, help you get a foot in the door, and encourage more class recommendations

Don't get discouraged if the number of outreach visits conducted or recommendations made are small at the time of your first evaluation. It takes time to establish relationships with providers and make the leap from outreach to provider recommendation to patient enrollment in a class.

You can use the **Evaluation Summary Report** Outline provided in this toolkit. A copy of the template is included in **Appendix E**; you can download the Word file from www.cdc.gov/arthritis/interventions/marketing-support/1-2-3-approach and save it to your personal computer. A snapshot of the template appears to the left. Complete each section as prompted and delete the prompts when you're finished.

Here's the information you'll want to capture in this report.  See sidebar on page 53 for details.

- Your outreach strategy, including the interventions you promoted, the practices you targeted, and your criteria for selecting them.

- Outreach activities and level of effort required, including the size and composition of your marketing team, staff roles and responsibilities, average number of contacts made per targeted practice, number and percentage of contacts by contact type, insights on factors that contribute to outreach success (e.g., staff characteristics, training), and outreach strategies used with high-yield practices.
- General assessment, including a tally of the number of recommendations you secured from targeted practices, data on how participants heard about the classes, and materials or approaches to which PCPs were particularly responsive.
- Conclusions and lessons learned, including benefits and challenges and your assessment of the overall effectiveness of your outreach efforts.

The 1-2-3 APPROACH TO PROVIDER OUTREACH

Evaluation Summary Report
[Your Organization and Program Name]

Reporting Period:

Outreach Strategy
[List the interventions you promoted, the practices and geographic areas you targeted, and your criteria for selecting them. You can use the criteria from your marketing and promotion plan.]

Outreach Activities and Level of Effort
[Specify how many people were on your marketing team and briefly describe their roles and responsibilities.]
[Calculate the total average number of contacts your staff made per targeted practice. You can do this by adding the total number of contacts your staff made across all practices and dividing by the number of practices you targeted. You might report both overall figures, as well as separate averages for practices that both received and did not receive an outreach visit from one of your marketers.]
[Show the number and percentage of contacts by contact type. You can use the table shell below.]

Contact Type	Number of Contacts	Percentage of Total Contacts
Phone		
E-mail		
Mail		
Drop-off		
Other		
Outreach visit		
TOTAL		

Marketing Activities Interventions to Primary Care Practices

Evaluation Summary Report

[Give your observations about factors that contributed to outreach success—e.g., completing an outreach visit with a practice. For example, these factors could include the experience, training, or mix of your marketing staff, the contact types you used, or characteristics of the practice or primary care providers.]

General Assessment
Use the How Did You Hear? data to document how participants heard about the classes—in person, and written medical settings—and to tally the number of recommendations you secured in targeted practices. You can use the table shell below.

Participants Heard About the Class

Source	Number of Responses	Percentage of Total Responses
Friend, family member, or contact		
Previous class participant		
Class instructor		
Medical practice		
Community or faith leader		
Brochure, flyer, poster, poster (medical practice)		
Radio, TV, newspaper		
Web site		
Unknown		
Other		
TOTAL		

Preparing the Evaluation Summary Report

Evaluating outreach efforts provides valuable feedback that will enable you to refine your marketing strategies to achieve your class participation targets.

The evaluation summary report asks you to describe

- Your outreach strategy, including
 - the interventions you promoted
 - the primary care practices (PCPs) you targeted and your criteria for selecting them
- Outreach activities and level of effort required, including
 - the size and composition of your marketing team
 - staff roles and responsibilities
 - frequency and type of contact with PCPs
 - insights on future outreach to PCPs
 - recommendations on factors that contribute to outreach success (e.g., staff characteristics, training)
 - list of PCPs that generated the greatest number of recommendations and the number of contacts with those practices
 - description of outreach strategies with high-yield practices
- General assessment, including
 - a tally of how participants heard about the classes, particularly from targeted PCPs, with a breakdown of PCP staff who generated recommendations
 - materials or approaches that PCPs found particularly helpful
 - your thoughts on the factors that motivated patients with arthritis to act on a provider recommendation

- Conclusions and lessons learned, including your
 - assessment of how PCP outreach fits with your program's other responsibilities
 - advice for other programs planning PCP outreach
 - benefits and drawbacks of the outreach approach

What You'll Need

Appendix C: Training and Marketing Tools

- Provider Outreach Tracking Spreadsheet

Appendix E: Evaluation Tools

- How Did You Hear? Form (in English and Spanish)
- How Did You Hear? Data Entry Spreadsheet
- Evaluation Summary Report Outline

