



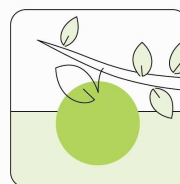
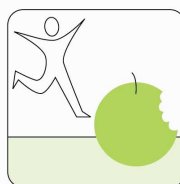
**EU Public Health Outcome Research and Indicators Collection
EUPHORIC Project
Grant Agreement n° 2003134**

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Directorate General for "Health and Consumers"*

**Deliverable N. 3
Evaluation Plan**

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EUPHORIC Project

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Introduction

The objectives of the EUPHORIC project are to integrate previous knowledge and field experience, to produce protocols for data collection, and to harmonize and analyze outcome indicators. EUPHORIC is funded as part of the Programme of Community Action in the Field of Public Health (2003-2008)⁽¹⁾, which derives from the EU-promoted health strategy based on the health provisions introduced in Article 129 of the Maastricht Treaty and Article 152 of the Amsterdam Treaty.

The overall goal of the Programme of Community Action, which was adopted by the European Parliament and Council on 23 September 2002, is “to protect human health and improve public health”. It includes three strands of action:

1. to improve information and knowledge for the development of public health
2. to enhance the capability of responding rapidly and in a coordinated fashion to health threats
3. to promote health and prevent disease through addressing health determinants across all policies and activities.

EUPHORIC focuses on outcome research, in particular, on the first strand, through actions and support measures, specifically: “developing and operating a sustainable health monitoring system to establish comparable quantitative and qualitative indicators at community level on the basis of existing work and of accomplished results (...)”. The importance of outcome research has become evident as a means of promoting best practices and controlling health expenditure. Most EU countries have acknowledged that the monitoring of efficiency and effectiveness in the health field can contribute to ensuring quality healthcare. However, these actions require objective and reliable indicators. To this end, the use of common methodologies is imperative.

These considerations have implications for EUPHORIC’s planning and implementation, as well as for monitoring and evaluation. The assessment of the project’s success must take into account its complexity and the obstacles that are unique to its context.

Definitions and Theory

In this section, key definitions and general principles that are relevant to evaluation are provided. This information will allow readers to have a more thorough understanding of EUPHORIC’s evaluation strategy and plan.

Evaluation consists of systematically assessing the results of a project by comparing them to a set of standards, with the ultimate goals of:

- Improving the project’s effectiveness;
- Making participants accountable;
- Optimizing resource allocation; and
- Authorizing project continuation/revision/termination.

EUPHORIC Evaluation Plan

EUPHORIC’s monitoring and evaluation focussed on those aspects that were critical to creating and expanding the consortium and for the outputs of the Work Packages (WP). With regard to the consortium, the key question that needed to be answered by EUPHORIC’s monitoring and evaluation was: “How far has the project contributed to sharing the resources and information with the consortium’s members?”. With regard to the outputs of the WPs, the main question was: “Have specific WPs delivered their products and achieved their objectives?”

¹ Decision No 1786/2002/EC of the European Parliament and of the Council of 23 September 2002 adopting a programme of Community action in the field of public health (2003-2008) - Commission Statements

Therefore, the mandate of the evaluation was summarized as follows:

1. Active participation of both associated and collaborating countries in the project activities
2. Respect of the WPs' scheduled milestones and deliverables

The evaluation was performed using 2 tools:

- A questionnaire for evaluating the meetings (Appendix 1)
- A summary table of the WPs' milestones and deliverables, including indicators of their achievement

Methods

Questionnaire for evaluating EUPHORIC meetings

The questionnaire included 8 questions and was divided into four sections: AGENDA, PROCESS, MINUTES OF THE MEETING and PARTICIPANTS (see Appendix 1).

- AGENDA concerns how the meetings were organised and carried out. The questions focus on the meeting's agenda and on the amount of time dedicated to each of the planned topics of discussion (3 questions)
- PROCESS refers to the quality of discussions among the participants about the main topics included in the agenda (1 question).
- MINUTES OF THE MEETING regards the circulation of the minutes among the partners and the accuracy of the minutes (2 questions).
- PARTICIPANTS refers to each participant's awareness of the activities of the other participants, including the results, resolutions and calls for action.

For each question, the possible scores ranged from 1 to 5 (with 1 indicating total disagreement with the affirmation made in the questionnaire and 5 indicating total agreement). The evaluation was only conducted for the final workshop held in Rome at the *Istituto Superiore di Sanità*, 11-12 December 2008. One copy of the questionnaire was distributed to each of 10 partners participating in the workshop, which consisted of five of the six Associated Beneficiaries (AB) and five of the eight Collaborating Partners (CP). Eight of the partners completed the questionnaire and sent it back to the Project Coordinator.

A summary table of the milestones and deliverables of the WPs

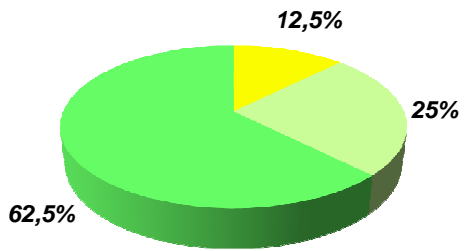
A summary table was created to describe the milestones and deliverables of each WP, including the indicators used to assess their completion (i.e., whether the specific objectives had been reached and the expected and actual dates).

Results

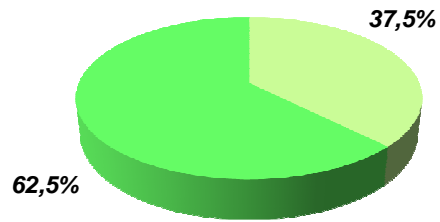
Figure 1 summarizes the answers provided on the questionnaire for evaluating the final workshop. For the first section (AGENDA), the 8 partners generally gave high scores for the three questions. For the second section (PROCESS), 7 of the partners gave the highest score. For the third section (MINUTES OF THE MEETING), for both of the questions, 6 partners gave the highest score, 1 gave the lowest score, and 1 did not answer; neither of the latter two partners had received the minutes at the time of completing the questionnaire. However, the same partners remarked in the final notes that they very much appreciated both the meeting and the discussed topics. For the last section (PARTICIPANTS), for both questions, 4 of the partners gave the highest score.

Table 1 summarizes the results of the final assessment of the project.

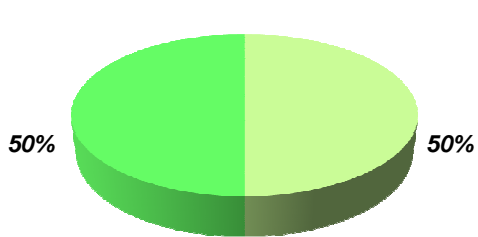
SCORE: No answer ■ Totally disagree ■ ■ ■ ■ Totally agree



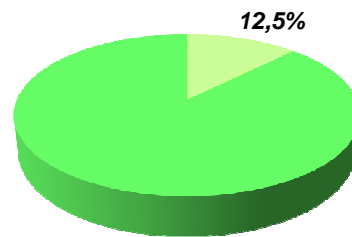
Section I (AGENDA): question 1



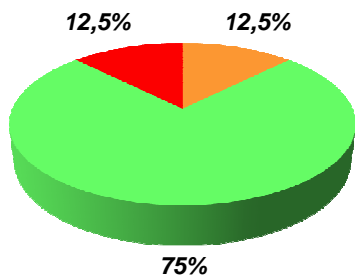
Section I (AGENDA): question 2



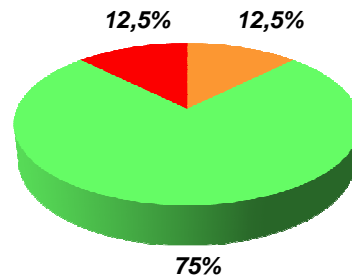
Section I (AGENDA): question 3



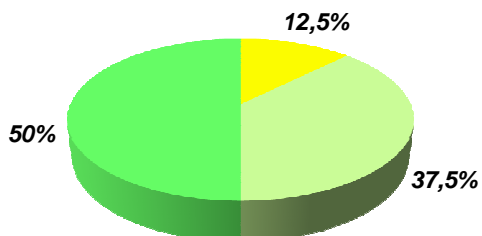
Section II (PROCESS): question 4



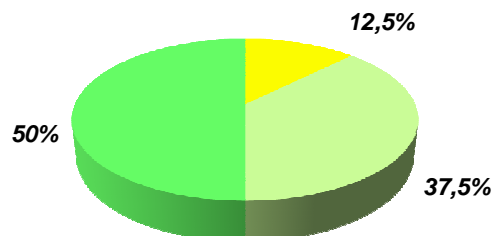
Section III (MINUTES of the MEETINGS): question 5



Section III (MINUTES of the MEETINGS): question 6



Section IV (PARTICIPANTS): question 7



Section IV (PARTICIPANTS): question 8

Figure 1. Questionnaire for evaluating the final workshop: scores distribution per question

Table 1 - Milestones and deliverables of the WPs

WP	Activity/Task	Outcome/Deliverable	Indicator used to assess the outputs and whether the specific objectives were reached	Expected date of achievement	Actual date of achievement
1	Establishment of the initial consortium	Consortium	Actual number of partners in the consortium compared to expected number	June 06	Dec 06
	Creation of the work plan	Document containing work plan	Work plan agreed upon by partners	Mar 06	Aug 07
	Organization of coordination meetings and final workshop	Meeting held and minutes	Actual number of meetings with respect to expected number, and minutes	2 meetings per year of activity (total of 3 years)	16 Dec 04 9 June 06 24 Apr 07 9 Oct 07 27-28 Mar 08 11-12 Dec 08
	Drawing up of interim and final reports (financial and technical)	Report	Actual number of reports with respect to expected number	Feb 07 Feb 08 March 09	<i>1st interim report:</i> Feb 07 first submission Aug 07 submitted in revised form <i>2nd interim report:</i> Mar 08 <i>Final report:</i> May 09
	Involvement of other Member States	Official letters of invitation	Number of letters sent with respect to number of desired partners	June 08	Dec 07
	Evaluation of the project: Preparation of the protocol	Document containing protocol	Completion of document containing protocol	Dec 07	Feb 08
	Evaluation of the project: Analysis of the results of the questionnaire for evaluating meetings	Report with results of questionnaire	Completion of report with questionnaire results	Dec 08	Feb 09
2	Define the diffusion policy	Document with diffusion policy	Completion of document, agreed upon by partners	June 07	Apr 07 in draft form Oct 07 in final form
	Preparation of the dissemination plan	Document	Completion of document	Dec 07	Nov 07 in draft form Feb 08 in final form Feb 09 updated to include all involved institutions
	Setting up of a website	Website	Website published, available to the project partners and performing the basic functions	Three phases: Apr 07 Oct 07 Dec 08	Three phases: Apr 07 Oct 07 Dec 08

Table 1 - Milestones and deliverables of the WPs (*continued*)

WP	Activities/Tasks	Outcomes/Deliverables	Indicators used to assess the outputs and whether the specific objectives have been reached	Expected date of achievement	Actual date of achievement
3	Setting up of contacts with other projects	Sharing of methodologies and results	Number of project reference persons contacted	Dec 07	July 08
4	Defining a list of outcome indicators	List of indicators	Number of indicators selected	June 06	June 06
	Assessing the current situation in participating countries	Report from each partner and document summarising the reports	Number of reports and completion of summary document	June 06	Apr 07
	Select diseases and procedures to test some indicators (pilots)	Technical presentation	Definitive selection of diseases and procedures	June 06	Apr 07
5	Cardiovascular pilot: Preparation of the protocol	Document containing protocol	Completion of protocol document (agreed upon by consortium)	Sept 07	July 07: draft version. Sep 07: final version
	Cardiovascular pilot: Indicator testing	Report with results of indicator testing	Number of indicators actually tested with respect to planned number	Sept 08	Dec 08
	Orthopaedic pilot: Preparation of the protocol	Document containing protocol	Completion of protocol document (agreed upon by consortium)	Sept 07	Nov 07
	Orthopaedic pilot: Protocol implementation	Report with results of implementation	Level of implementation	Sept 08	Dec 08
	Description of the hospital discharge record datasets	Report containing description	Number of datasets analyzed	Dec 07	Dec 08
6	Data input in database	Database available online	Amount of data	Dec 08	Dec 08

Conclusions

To perform the continuous monitoring of a project, a detailed evaluation plan must be prepared before the project begins. This plan should consider all of the items that need to be assessed and are defined as "critical". For each item, an appropriate evaluation tool (e.g., questionnaires, GANTT charts, progress tables) must be adopted regularly, following a specific schedule, and the use of these tools must be based on a well-defined protocol. In this way, it would be possible to have continuous feedback on the progress of the project. Based on this information, a feasible solution could be found for potential problems.

Initially, EUPHORIC did not include an evaluation phase. In fact, the evaluation plan was developed three years after the project had already begun and it was actually performed only for the last year of activity. Thus many of the benefits of evaluation were not reaped, such as resolving problems as they emerge. The fact that the questionnaire was administered only after the final workshop and the summary table was filled in at the end of the project made it impossible to perform any comparative analysis. Nonetheless, the evaluation provided indications that may be useful for ensuring the quality of future initiatives and stressed the importance of performing these activities throughout the entire duration of a given project.

Appendix 1: Questionnaire for evaluating EUPHORIC meetings

This short questionnaire aims to assess how our meeting functioned. The results will be summarized in the final evaluation report that will be available to participants on the EUPHORIC website.

Please state (not obligatory):

Name:

Area where you come from:

Please answer the following questions by circling the score which best reflects your opinion from the lowest (1 if you totally disagree) to the highest (5 if you totally agree).

Section I: AGENDA

1 The meeting’s goals were clearly stated and understood

Totally disagree 1 2 3 4 5 Totally agree

2 The topics in the agenda were appropriate at the current stage of EUPHORIC

Totally disagree 1 2 3 4 5 Totally agree

3 The time allowed for the meeting was balanced with the number of topics planned

Totally disagree 1 2 3 4 5 Totally agree

Section II: PROCESS

4 The discussion was open enough to consider different opinions and options

Totally disagree 1 2 3 4 5 Totally agree

Section III: MINUTES OF THE MEETING

5 The minutes of the meeting were prepared and sent to the participants

Totally disagree 1 2 3 4 5 Totally agree

6 The minutes of the meeting were accurate and understandable to the participants

Totally disagree 1 2 3 4 5 Totally agree

Section IV: PARTICIPANTS

7 The participants knew what among the other members were working on and how they will contribute to the collective success

Totally disagree 1 2 3 4 5 Totally agree

8 The participants ended discussions with clear and specific resolutions and calls for action

Totally disagree 1 2 3 4 5 Totally agree

Please add any comment you consider relevant to how the meeting evolved and what can be done to improve the next ones.

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Thank you for your time.