



August 19, 2003

Dear Colleague,

Thank you for your request for information regarding the evaluation of the Swift, Efficient Application of Research in Community Health (SEARCH) Program. The current package was assembled to provide an overview of SEARCH-related evaluation initiatives both completed and underway.

SEARCH has been evaluated in various capacities, both internally and externally, since its inception in 1996. Several formative and summative evaluations have been conducted to assess various program components, including program design, training modules, short-term and longer-term impact for participants, curriculum and learning strategies, strength and success of the research network, and organizational impact. In addition, consultation is underway with faculty members to explore the anticipated outcomes of SEARCH at the university level.

A common lens from which to view SEARCH evaluation projects and findings, as well as to plan new evaluation projects, was developed in 2001 through the comprehensive SEARCH Program Evaluation, Research and Development Blueprint (Birdsell & Matthias, 2001). The Blueprint serves as an overall framework to guide the interconnected elements of program design, evaluation, implementation, development, and research. Evaluation questions are identified and prioritized from the perspective of multiple stakeholders (e.g., at the participant, organizational, university and system levels). A copy of the Blueprint has also been included in this package.

Given the development of the Evaluation Blueprint in 2001, SEARCH-related evaluation initiatives are presented in this document according to the following two categories:

- 📅 Pre-Blueprint Evaluation Initiatives (1996-2000)
- 📅 Post-Blueprint Evaluation Initiatives (2001-2003)

I hope that these materials will be useful to you in your professional endeavours.

Thank you again for your interest in the SEARCH Program and Evaluation initiatives.

Sincerely,

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The SEARCH Program and SEARCH-Related Evaluation Initiatives

Introduction to the SEARCH Program

SEARCH, the Swift, Efficient Application of Research in Community Health, is a partnership program designed to build capacity in the health system for producing and using research evidence to manage health services. The program was established in 1996 by the Alberta Heritage Foundation for Medical Research (AHFMR). It is built on collaboration among regional and provincial health authorities, universities, and government. Since 1996, the program has provided training to over 100 health practitioners¹ across the province representing more than 20 health organizations.

Evaluating the SEARCH Program

Evaluation has been recognized as an important component of SEARCH since its inception. Several independent formative and summative evaluations have been conducted to assess various program components, including program design, training modules, short-term and longer-term impact for participants, curriculum and learning strategies, strength and success of the research network, and organizational impact. In addition, consultation is underway with faculty members to explore the anticipated outcomes of SEARCH at the university level.

The development of a SEARCH Program Framework was initiated in 2000 as part of a process to clearly articulate the benefits of SEARCH to potential participating organizations and to translate learnings from SEARCH I and II participants into explicit program design. In the course of developing the program framework, the need for an Evaluation Blueprint was identified. This Blueprint was finalized in August 2001 and serves as an overall framework to guide the interconnected elements of program design, evaluation, implementation, development, and research.² One of the recommendations included in the Blueprint was to create a structure and/or mechanism for coordination of all evaluation and research activities. Furthermore, the need to increase internal capacity for ongoing evaluation and program monitoring/quality improvement has been identified by AHFMR staff closely involved with the SEARCH program.

Given the development of the Evaluation Blueprint in 2001, SEARCH-related evaluation initiatives are presented in this document according to Pre-Blueprint Evaluation Initiatives (1996-2000) and Post-Blueprint Evaluation Initiatives (2001-2003).

¹ This number includes 23 SEARCH I participants (1996-1998), 25 SEARCH II participants (1998-2000), 26 SEARCH III (2001-2003) and all current SEARCH IV participants (2003-2005).

² Birdsell & Matthias (2001). SEARCH Program Evaluation, Research and Development Blueprint.

Pre-Blueprint Evaluation Initiatives (1996-2000)

The following reports were prepared during and/or immediately following the first two iterations of the SEARCH program. Hard copies of most reports are available upon request. Electronic copies are not available at this time; however, a brief summary of each initiative is presented below.

SEARCH Program: Evaluation Framework (1996)

Applications Management Consulting Ltd

- A two-year evaluation framework, developed in 1996, included plans to gather feedback from participants at various stages of SEARCH including pre-project, end of each module, end of 7-week course, at the 6, 12, and 18 month points, and upon completion of the 2 year program.
- Proposed methods of data collection included questionnaires (mail and internet), visioning sessions, focus groups, and interviews (in-person and telephone).

SEARCH Program: Evaluation of the Seven Week Training Program (1996)

Applications Management Consulting Ltd

- The evaluation of the 7-week training program included feedback from program participants, instructors, supervisors, and CEOs.
- Reported short-term outcomes of participation in the 7-week training program included increased technical, computer, and research skills as well as increased networking opportunities.

SEARCH Communication Needs Assessment (SEARCH I and II)

Infoward

- Conducted the “SEARCH Instructors Communications Needs Assessment Survey”; “SEARCH Communication Needs Assessment – All Participants”; “SEARCH I Participant Responses to the Communications Needs Assessment Survey”; and “SEARCH II Participant Communications Needs Assessment Survey Results”.

SEARCH Summative Evaluation (1998)

Banister Research

- The summative evaluation of the first SEARCH program was conducted in 1998.
- Reported outcomes at the end of the 2-year program included networking, increased research skills, and an overall increased knowledge base among participants.

SEARCH II Evaluation Components (1998-2000)

Hebert, M.

Evaluation of Modules 1, 2, 3, 4, 5, and 6 (1998-1999)

- SEARCH II participants completed electronic surveys on laptop computers via the electronic survey software, *Surveyor*, at the completion of each session during each of six modules. A combination of Likert-scale and some open-ended questions were included in the surveys.

Six-Month Formative Evaluation (1998)

- At the 6-month phase (three modules of SEARCH II had been completed), most survey respondents noted that they had had opportunities to apply some of the information they learned in SEARCH. Areas most applicable and most often applied were research skills, program evaluation, and literature searches. Three most commonly identified benefits of participating in SEARCH were networking, access to resources, and learning new information and skills.

24-Month Participant Survey, Focus Groups, and Telephone Interviews with Supervisors (2000)

- The 24-month evaluation of the second SEARCH program included a participant survey, participant focus groups, and telephone interviews with supervisors.
- Findings included that “roles of the participants changed over the course of the 2 years, with a trend to including more of these research responsibilities in their jobs (although) participants noted they found it very difficult to determine how much of their increase in skills was related to SEARCH and how much was related to other courses or work requirements.”
- Other outcomes explored included application of skills, increased research responsibilities, personal and professional benefits, increased networking opportunities, opportunities to continue research activities, contribution to evidence-based decision-making, and impact of SEARCH in health authorities and the province.

Executive Summary Report: The SEARCH II Evaluation Process (2000)

- Includes SEARCH program goals and evaluation strategies.

Executive Summary Report: The SEARCH II Evaluation Results (2000)

- Synthesizes each phase of SEARCH II evaluation and results including the perceived impact of the SEARCH program from the perspective of key stakeholders included throughout the various evaluation phases.

The Adoption, Use, and Impact of Computer Technology in the SEARCH Program (1998)

Lau, F., & Hayward, R.

- The action research study completed in 1998 investigated ways in which participants adopted and used computer technology (e.g., laptop computers, search engines, etc.) as well as the impact of such technology.
- The study revealed participants became proficient with the technology over time in their own ways and were able to access research information and participate/facilitate in research projects for their regions.
- The authors further noted that “the participants were most enthusiastic when asked about the impact of computer technology on themselves. Many regarded it as an excellent opportunity to learn new knowledge and skills that had led to personal satisfaction, job enrichment, and possible career advancement.”

Assessment of the SEARCH Program in the David Thompson Health Region (1996-1998)

Smith, N.

- An independent assessment of the SEARCH program was conducted by one of 17 participating health regions.
- The report summarized perceptions about what SEARCH has achieved such as “creating regional cultures that recognize and value research activities”.

Building a Virtual Network in Community Health Research Training Program (2000)

Journal of American Informatics Association, 7 (4), 361-377.

Lau, F., & Hayward, R.

- Peer-reviewed journal publication regarding the building of a virtual network through SEARCH; includes a conceptual model to describe development of virtual networks in the community health setting.

SEARCH Program Evaluation, Research and Development Blueprint

Preamble

SEARCH is a complex program in a complex context, and there is a need to systematically assess and prioritize the enormous range of issues that could potentially be evaluated. The need for an Evaluation Blueprint, to guide the evaluation design and implementation activities over the next 10 years was identified in the course of developing an outcomes- and values-based program framework for SEARCH³. This blueprint is also intended to provide an overall orientation to subsequent evaluation consultants.

The development of this blueprint has included:

- Assembling as many of the documents related to SEARCH as could be identified and located, coding them as to content and application to evaluation;
- Telephone or Face to Face Interviews with SEARCH Steering Committee members, Evaluation Committee members and other key informants (List in Appendix A);
- E-mail interviews offered to all core faculty;
- Collation and thematic analysis of input;
- Synthesis of material into elements of the Blueprint and development of the proposed work plan.

SEARCH has been in continuous evolution and development since its inception, and there has been an ongoing commitment to continuous quality improvement, evaluation and also to contributing to the general body of knowledge about capacity building programs such as SEARCH. Therefore, it is difficult to draw distinct lines between program design, evaluation, development and related research. In the spirit of contributing on several fronts, and achieving maximum benefit from evaluation, research and development activities, this document addresses all of these. Thus, it has been titled SEARCH Program Evaluation, Research and Development Blueprint.

This document is a 'work in progress'. Initially written during the summer of 2001, it will serve as a 'blueprint', but will no doubt be updated as time passes. Components needing further development include the inventory of documents in appendix, theory of action, and the description of history and context.

The most recently revised Blueprint (September 2001) has been included (electronically) in the package.

³ The SEARCH Program Framework development began in 2000 as part of a process to clearly articulate the benefits of SEARCH to potential participating organizations, and to translate the learnings from the first two cohorts of SEARCH participants into explicit program design.

SEARCH Evaluation Action Plan From Blueprint

Recommendations included within the Blueprint were reviewed and considered by SEARCH program representatives. A detailed Action Plan was created based on these recommendations.

Selected recommendations, action plan items, and the current status for each item as of August 2003, are presented in the table below.

Table 1. Action Plan Emerging from Recommendations within the SEARCH Blueprint

Recommendation	Action	Status as of August 2003
1. Publish paper on SEARCH	Contract writer to assist with first draft.	<ul style="list-style-type: none"> • Writer contracted. • First draft prepared. • Requires editing, review, and revision before submission for publication.
2. Determine and set up coordination structure	Select and establish oversight group	<ul style="list-style-type: none"> • Decision to coordinate evaluation activity internally. • Director of Applied Health Research Programs and Coordinator of Impact Analysis to work together on internal and external coordination of all evaluation activity. • "Evaluation Subcommittee" of the SEARCH Steering Committee established. • "Evaluator's Group" (external consultants) established and meetings facilitated internally.
3. Finalize publications policy	Write, review, and revise	<ul style="list-style-type: none"> • Completed November 2001 • Distributed to SEARCH Steering Committee and Evaluators
4. Establish panel of experts	Select and establish Expert Panel	<ul style="list-style-type: none"> • Use of existing advisory structures including the SEARCH Steering Committee and the Evaluation Subcommittee • Convened workshops, invited expert consultation as necessary on a project-specific basis (e.g., organizational capacity workshop; assessing research networks)
5. Hold workshop of stakeholders	Select stakeholders and contract workshop planning	<ul style="list-style-type: none"> • Decision to combine workshops within current venues and project-specific needs as described above
6. Establish administration and data processes	Integrate process development into appropriate evaluation projects.	<ul style="list-style-type: none"> • Specified data ownership issues within RFPs as necessary (e.g., evaluation data collected by external consultants may become the property of the SEARCH program).

Recommendation	Action	Status as of August 2003
7. Develop evaluator requirements	Prepare standard evaluator requirements and RFP template	<ul style="list-style-type: none"> Standard requirements developed as part of RFP process (November 2001)
8. Develop RFPs	Define projects and draft RFPs	<ul style="list-style-type: none"> Seven potential evaluation projects outlined RFPs prepared and distributed 1 of 7 projects completed (Success and Progress of Participants) 5 of 7 projects ongoing (Project Tracking; Curriculum and Learning Strategies; Success and Goals of RHAs; Success and Goals in Faculties; and Strength and Success of the Research Network). 1 of 7 projects (Fit and Impact for AHFMR) not yet initiated as a separate “project”; however, potential to explore during future Site Review and/or combine with existing initiatives/review internally.
9. Explore changes in the University Sector	Integrate into one evaluation project	<ul style="list-style-type: none"> Included as one of the 7 evaluation projects referred to above (Success and Goals in Faculties, currently referred to as the “Faculty Consultation Project”).
10. Refer internal integration question to Impact Assessment Unit	Define internally focused projects and timing.	<ul style="list-style-type: none"> Internal and/or external focus and integration of each project identified. Coordination referred to Impact Analysis Coordinator.
11. Develop process for integration of results	Determine needs and organizational processes.	<ul style="list-style-type: none"> Facilitated in part by the Evaluators Group and Evaluation Subcommittee Meetings scheduled for September and October 2003 to integrate findings of various reports.
12. Develop dissemination plan.	Integrate dissemination plan with other Applied Health Research Program planning.	<ul style="list-style-type: none"> Various conference presentations emerging from SEARCH-related evaluation initiatives. Integrated dissemination plan ongoing.
13. Plan Site Visit	Identify participants and invite/schedule site visit	<ul style="list-style-type: none"> Pending further discussion
14. Conduct literature reviews on all key areas of program design.	Integrate into project RFPs	<ul style="list-style-type: none"> Project requirements include literature review.

Post-Blueprint Evaluation Initiatives

As described in the previous section, seven potential evaluation projects were outlined in the action plan in response to the Blueprint recommendations. RFPs were distributed and evaluation consultants were contracted.

As of August 2003, one project has been completed and five are in various stages of completion. One project (Fit and Impact for AHFMR) has not been initiated as a separate “project”; however, there is potential to explore the issues identified during future Site Review and/or combine with existing initiatives.

The status of each of the seven evaluation projects is described below.

Project 1: Participant Success and Progress

Follow-up to assess the medium and longer term outcomes for SEARCH I and II participants was conducted in 2002. The final report (Final SEARCH I and II Impact Evaluation – Participant Survey, June 2003) has been included in this package.

Survey questions assessed a variety of anticipated long-term outcomes identified through the development of a program logic model. Outcomes included participant skill development and improvement, continuous application of knowledge and skill developed through SEARCH, availability and participation in ongoing learning opportunities, participant role as resource to the organization, integration of participants in a virtual community, mutual support and increased capacity for evidence based decision making.

In addition, follow-up to assess the short-term outcomes for SEARCH III participants was conducted in 2002. The final report (Final Revised SIII Midpoint Evaluation, July 2003) has also been included in this package.

Project 2: SEARCH Project Tracking

One of the core components of the SEARCH program includes the completion of at least one individual project relevant to local needs as well as a group project addressing a cross-region issue. More than 50 individual projects and 12 group projects were initiated by SEARCH participants during the first two iterations of the program.

The SEARCH Project Tracking evaluation included individual follow-up with each SEARCH I and II participant regarding the extent to which projects were completed as planned. The evaluation project also collected data, from the perception of SEARCH participants, regarding the extent to which SEARCH project findings were disseminated, applied or used in practice, and what difference SEARCH projects have made at the individual, organizational, and/or health system level.

A preliminary report, prepared in March 2003, has been included in this package (Project Tracking Preliminary Findings). A draft final report is currently being prepared.

Project 3: Curriculum and Learning Strategies

Curriculum and learning strategies are evaluated constantly using electronic survey software to gather feedback from participants. Results are shared immediately with SEARCH faculty; concerns may be addressed promptly and changes implemented as required.

The “project” itself has not unfolded as initially envisioned; however, rich and extensive data exists for potential future initiatives.

Project 4: Success and Goals in RHAs: Assessing Organizational Impact

An extensive, comprehensive evaluation regarding success and goals within RHAs and organizations, including an assessment of organizational capacity for research has been conducted. Draft copies of two technical reports (Technical Report I and II) are included in this package.

Project 5: Success and Goals in Faculties

A consultation with SEARCH faculty is underway; report not available at the time of preparation of this package (August 2003).

Project 6: Strength and Success of the SEARCH Network

A workshop was sponsored to assist with the development of Project #6 included expert consultation regarding the strength and success of networks; report not available at the time of preparation of this package (August 2003).

Project 7: Fit and Impact for AHFMR

As stated above, the “Fit and Impact for AHFMR” recommendation has not been initiated as a separate “project”; however, there is potential to explore the issues identified during future Site Review and/or combine with existing initiatives.