# **OPTIONAL: Evaluation & Performance Measurement Plan Template**

**Instructions:** This is an optional template you can use for providing your evaluation & performance measurement plan (maximum page limit of 20 pages). For funded recipients, this template will be updated 6 months post-award. Please use this template to outline your approach to meeting the following evaluation requirements:

* Evaluation of required prevention interventions
* Performance measurement reporting
* Targeted evaluation project focused on navigation interventions
* Evaluation translational product
* Evaluation community of practice
* Cross-site evaluation.

For more guidance, please refer to the *Evaluation and Performance Measurement* section of the Notice of Funding Opportunity (NOFO). The [OD2A Evaluation Profiles](https://www.cdc.gov/drugoverdose/od2a/evaluation.html) and CDC resources on [writing SMART objectives](https://www.cdc.gov/dhdsp/evaluation_resources/guides/writing-smart-objectives.htm) also might be helpful.

**Definition of key terms used in this template:**

**Evaluation Question:** Evaluation questions can be either process or outcome focused, and these should be distinguished in your plan. Evaluation questions describe exactly what you are evaluating. Example evaluation questions are provided for the “enhance PDMP” intervention: (1) To what extent were barriers to PDMP registration removed? (2) To what extent were healthcare professionals accessing the PDMP? (3) To what extent were PDMP registration and use percentages changed?

**Outcome:** Describe general benefits related to changes in behavior, skills, knowledge, attitudes, values, condition, status or other attributes. Outcomes can be short-term, intermediate, or long-term and should align with logic model outlines. An outcome example is *improved PDMP registration*.

**Indicators:** Measure achievement and are considered operationalized outcomes; specify how the outcome will be measured. An indicator example for the outcome “improved PDMP registration” is *percent of prescribers registered with PDMP.* Indicators are closely tied to the outcomes that are in the logic model/NOFO and should be responsive to evaluation questions.

**Data Collection Method:** In this column of the template, describe how the data will be collected (e.g., survey, key informant interview, document review).

**Data Source:**  List the source of your data. For example, if it is your PDMP, then list the name of your PDMP. If another existing data system is being used for health outcomes, list the name of that system. If you are collecting new data, then describe who you are collecting data from (e.g., healthcare providers, people with lived experience).

**Timeline:** Describe the frequency of data collection, data analysis, and dissemination (e.g., monthly, quarterly, annually).

**Insert Name of Applicant**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Overall Evaluation Approach** | | | | |
| Describe how health equity will be integrated throughout your evaluation efforts: |  | | | |
| Describe the approach to considering the needs of priority populations (e.g., persons at increased risk of overdose; persons disproportionately affected by overdose) and people with lived experience during program/evaluation planning and development: |  | | | |
| Describe how the evaluation will measure the impact of tailored interventions for groups disproportionately affected by overdose: |  | | | |
| Describe how evaluation data will be used to inform program improvement and disseminated to various partners, collaborators, and affected groups (e.g., persons with lived experience and other priority populations). (Dissemination methods should vary depending on the audience.): |  | | | |
| **Evaluation of all required prevention interventions** | | | | |
| **Utilize Navigators for Linkage**  Navigators can include peer navigators, certified peer recovery specialists, peer support specialists, case managers, patient navigators, community health workers, persons with lived experience, and other individuals who link persons who use drugs (PWUD) to care and harm reduction resources. These are individuals familiar with the local public health landscape and who work directly with individuals with opioid use disorder (OUD) and/or stimulant use disorder (StUD) to ensure they have the tools to address barriers to seeking care and who support people accessing treatment and supporting their retention (and reengagement if necessary) in SUD treatment and care, and support accessing other services, such as harm reduction and social supports. CDC defines linkage using navigators as: 1) linkage to evidence-based treatment for substance use disorders- to include MOUD and other treatment (e.g., cognitive behavioral therapy [CBT], contingency management) and 2) linkage to harm reduction services*.* | | | | |
| Describe the type of evaluation to be conducted (i.e., process, outcome, or both): |  | | | |
| Describe the \*timeline of evaluation efforts and how findings will be used to guide program improvement: |  | | | |
| **\*Key Evaluation Questions** | **\*Indicators** | **\*Outcomes** | **\*Data Collection Methods** | **\*Data Sources** |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3.  (Add additional rows as needed) |  |  |  |  |
| **Additional Context** (Note any additional descriptions that would be helpful to understand the planned evaluation of this intervention): | | | | |
| **\*Denotes terms that are defined on page 1 of this template** | | | | |
| **Naloxone Distribution** | | | | |
| Describe the type of evaluation to be conducted (i.e., process, outcome, or both): |  | | | |
| Describe the timeline of evaluation efforts and how findings will be used to guide program improvement: |  | | | |
| **Key Evaluation Questions** | **Indicators** | **Outcomes** | **Data Collection Methods** | **Data Sources** |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3.  (Add additional rows as needed) |  |  |  |  |
| **Additional Context** (Note any additional descriptions that would be helpful to understand the planned evaluation of this intervention): | | | | |
| **Clinician/Health System Engagement Interventions**  Please account for the following interventions:   * Educating clinicians on best practices for acute, subacute, and chronic pain including opioid prescribing, as described in the *CDC Clinical Practice Guideline for Prescribing Opioids for Pain – United States, 2022 (“2022 CDC Clinical Practice Guideline”)* * Training clinicians on screening, diagnosis, and linkage to care and retention in care for opioid use disorder (OUD) and stimulant use disorder (StUD) * Building and implementing health system-wide clinical capacity to screen, diagnose, and support (or connect to) longitudinal care for OUD and StUD and support recovery for adults and adolescents | | | | |
| Describe the type of evaluation to be conducted (i.e., process, outcome, or both): |  | | | |
| Describe the timeline of evaluation efforts and how findings will be used to guide program improvement: |  | | | |
| **Key Evaluation Questions** | **Indicators** | **Outcomes** | **Data Collection Methods** | **Data Sources** |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3.  (Add additional rows as needed) |  |  |  |  |
| **Additional Context** (Note any additional descriptions that would be helpful to understand the planned evaluation of this intervention): | | | | |
| **Expand PDMP Data Sharing** | | | | |
| Describe the type of evaluation to be conducted (i.e., process, outcome, or both): |  | | | |
| Describe the timeline of evaluation efforts and how findings will be used to guide program improvement: |  |  |  | |
| **Key Evaluation Questions** | **Indicators** | **Outcomes** | **Data Collection Methods** | **Data Sources** |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3.  (Add additional rows as needed) |  |  |  |  |
| **Additional Context** (Note any additional descriptions that would be helpful to understand the planned evaluation of this intervention): | | | | |
| **Performance Measures** | | | | |
| List potential performance measures related to the NOFO logic model short-term and intermediate-term outcomes:  *Reminder: The logic model is embedded in the approach and outcomes section of the NOFO.* |  | | | |
| Describe how you will collect the performance measures and the frequency of data collection: |  | | | |
| Describe how you will assure quality of performance data: |  | | | |
| Describe how key program partners will participate in the evaluation and performance measurement planning processes: |  | | | |
| Describe barriers to obtaining and calculating proposed measures: |  | | | |
| Outline additional comments or questions you have about the proposed measures: |  | | | |
| **Targeted Evaluation Project (TEP)** | | | | |
| Describe your overall approach to the TEP including potential key evaluation questions, indicators, data collection methods, and data sources:  ***Please note***: The TEP should be a more in-depth evaluation of your navigation interventions for linkage to care and harm reduction services. Please refer to *Appendix 8* of the NOFO for more details. |  | | | |
| Describe the annual timeline of key steps for conducting the TEP (e.g., Year 1 planning and development, Year 2 conduct evaluation activities) and how findings will be used to guide program improvement: |  | | | |
| **Evaluation Translational Product**  Translational products can include but are not limited to detailed reports, training or technical assistance resources, case studies, or peer-reviewed publications. | | | | |
| Describe how you will identify which evaluated prevention intervention will result in a translational product: |  | | | |
| Describe the potential dissemination channels and intended audiences of the product: |  | | | |
| **Evaluation Community of Practice (CoP)** | | | | |
| To promote sharing between jurisdictions and between CDC and funded recipients, recipients will participate in a community of practice (CoP), specifically focused on evaluating their overdose prevention interventions. The CoP will meet quarterly beginning the first year of the cooperative agreement.  Describe how you plan to participate in and contribute to the evaluation CoP: |  | | | |
| **Cross-site Evaluation** | | | | |
| Recipients will be expected to participate in a CDC-sponsored cross-site evaluation by sharing data already collected and/or participating in new data collection activities. Recipients will be expected to share data collected via a cross-site evaluation with CDC and/or its designee (e.g., contractor). | | | | |