Updating Evaluation Plan

Workplan Objective/Activity Description

Include within Progress Report 6 due August 31, 2025 (new deadline)

- **Activity 3.2.e, Key Partners**
  Develop and implement tailored trainings for Key Partners on how to integrate oral health in their respective settings through oral health education, assessment, counseling, and linkage to care in the community (referral, and follow up for oral health care).
    (D) Evaluation of trainings

Due by August 31, 2026 (new deadline)

- **Activity 1.5, Evaluation Plan**
  Develop a new, or continue implementing an existing Evaluation Plan, to monitor and assess the progress and success of the Local Oral Health Program (LOHP) Work Plan objectives.

- **Activity 1.5.b, Evaluation Plan**
  Update the Program Logic Model* as needed, use as a common reference point for staff, stakeholders, constituents, and CDPH/OOH. Note: Newly established LOHPs are responsible for developing a new Program Logic Model.
    (A) Program Logic Model that depicts program outcomes, how the program will accomplish outcomes and basis (logic) for these expectations

- **Activity 1.5.c, Evaluation Plan** (please note the activity number has been revised from 1.5.e to 1.5.c)
  Focus the evaluation design based on the Evaluation Plan to include an updated grid and crosswalk of Work Plan objectives.

    (A) Provide comprehensive updated Evaluation Plan crosswalk grid of required and selected implementation objectives

For your convenience we have added instructions for related objectives due later. These objectives may be incorporated to the plan when they are due.

<div style="background:#1a2a6c; color:white; text-align:center; font-weight:bold;">Instructions</div>

An existing evaluation plan may be updated to include the following objectives. To streamline efforts, Office of Oral Health (OOH) has determined these objectives can be **integrated into a single, comprehensive evaluation plan.**

The established multiyear Evaluation Plan (EP) is designed to be dynamic, allowing for annual or as-needed reviews to ensure that priorities and feasibility considerations remain relevant for the planned evaluation

Changes that can be made with approval include:

- Modifications to evaluation questions to align with new projects and workplan activities

- Updates to data collection methods or data sources based on revised evaluation questions

- Adjustments to the budget

- Revisions to staffing arrangements or staff responsibilities, such as roles in data collection or analysis

- Alterations to the evaluation methodology

Any updates to the plan need to be clearly supported with a detailed rationale. As changes are made to the EP, it is important to ensure that the overall goals, scope, coverage, and timing remain reflective of the Moving California Oral Health Forward, Workplan 2022-2027, and are realistic for implementation.

Please keep in mind that the EP assesses the activities of the 2022-2027 work plan, not the CHIP. We suggest that the LOHP discuss possible EP changes with their advisory committee, and any changes or deletions should be agreed upon and noted in advisory committee meeting minutes.

Annual Review

The annual review is designed for the organization's leadership to take stock of the institutions progress.

- Have the immediate goals been met in the plan?
- Have goals and/or objectives changed?
- Are the allocated resources meeting demands or are there shortfalls?
- Are there issues with data collection that require changes or updates in the EP?

- Is the organization on schedule to meet its intermediate goals outlined in the plan?
- Is the plan's budget within programmed expectations?
- Have planned improvements in tactics met expectations?
- With the experience garnered during the 2017-2022 grant cycle of working the plan, is there anything missing in the plan? If so, does this issue need to be addressed immediately, or can it wait for the planned overall review?

If any of the answers fall short of expectations, then that area of the plan needs to be addressed. Proper revisions should be made to the section, with the changes monitored periodically to ensure the revision was adequate.

Revising and Updating the Plan

Six months after the start of the grant, the LOHP should review the EP and discuss the gains and misses that took place during the year.

At a minimum, a plan review should:

- Compare actual with projected results
- Compare estimated timetables with documented completion dates
- Grade the plan on whether it's on time and target

The annual review should provide a strong indication on how well the plan is working. If some things are not going as planned, then the necessary resources should be aligned to make the updates and revisions to the plan.

If the review shows there are no major changes needed, that the strategies are proceeding on schedule and the goals are being met, then the LOHP should reconfirm its strategies, objectives, and goals and continue moving forward following the plan.

On the other hand, if the review reveals significant changes are needed, then major revisions are in order.

Changes to the EP ensure that:

- EP remains balanced and covers all aspects of the work plan
- Completion dates are realistic, measurable, and attainable
- New evaluation questions have been included and
- Advisory committee responses and key actions are up to date

For objective 1.5, submit a revised EP using tracked changes to your Program Consultant for OOH review.

If no changes were identified, submit the EP that will be used for the 2022-27 grant, noting that no changes were required.

LOHPs are not required to rewrite the EP submitted in the 2017-2022 cycle.

<div style="background-color:#1F3864; color:white; text-align:center; font-weight:bold;">Resources</div>

Please note: The attached resources were developed for the past LOHP Workplan 2017-2022 and include outdated objective numbers and due dates, which do not apply to the current Moving California Oral Health Forward (LOHP) Workplan 2022- 2027.

1. Evaluation Resource Guide-CDPH OOH.pdf (ucsf.edu)
2. Evaluation Plan Template for LOHPs.pdf (ucsf.edu)
3. Frequently Asked Questions (ucsf.edu)
4. Evaluation Resources | DNPAO Programs | CDC