Massachusetts
Evaluation Plan

MERRIMACK VALLEY AGING AND DISABILITY RESOURCE CENTER GRANT

REVISED DRAFT OF PROJECT OBJECTIVES, TASKS AND INDICATORS

* year one activity
** year two activity
* * * required data element
no star suggested, not necessary to report

June 17, 2004

Objectives	Tasks	Indicator	Indicator Source	Indicator Type
1. Establish Resource Collaborative in the Merrimack Valley Community.	A. Hire and Train Project Staff: -- Project Director -- Project Coordinator -- Intake Workers -- Outreach & Training Coordinator	• Date person hired* • Number of trainings attended, each person*	Grant Reporting	Structure
	B. Create ADRC Coordinating Committee	• Date first meeting* • # of meetings*	Grant Reporting Meeting Minutes	Structure
	C. Convene Community Partners Advisory Group	• # local groups identified* • # state groups identified* • # local groups joined* • # state groups joined* • date first meeting*	Documentation	Structure
	D. Convene Consumer Board	• # consumers identified* • # consumers joined* • date first meeting*	Grant Reporting	Structure

Objectives	Tasks	Indicator	Indicator Source	Indicator Type
	E. Develop an Integrated Intake Team (IIT)	• date first meeting with ESMV and NILP staff * • # meetings*	Grant Reporting Meeting Minutes	Structure
	F. Develop Process for Intake and Referral	• Development or adoption of common intake tool to keep track of # of contacts, type of clients served, # referrals to public and non-public agencies and services* • # trainings for intake staff* • Satisfaction with training*	• Work Product • Grant Reporting • NAPIS • ESMV HOMIS Database • ESMV Age-Info Reports • NILP Database • Satisfaction surveys	Process
	G. Develop Coordinated Case Management Process for All Consumers	• Development of lead agency protocol for ESMV and NILP**, *** • Development of protocol for documenting and communicating service/support plan changes**,*** • Development of confidentiality protocol**,*** • # trainings for case management staff** • Satisfaction with trainings**	• Grant Reporting • Meeting Minutes • Satisfaction Surveys	Process

Objectives	Tasks	Indicator	Indicator Source	Indicator Type
2. Create Visible, Trusted and Accessible Entry Point	A. Establish Phone Number and Other Means of Entry for Consumers	• Identification of consumer access points and methods for ADRC* • # /types of contacts by agency *, *** • type of assistance provided*, *** • # contacts by FTE*,*** • contacts by 1,000 target population or PSA*, *** • # staff answering phones* • Hours phone lines are being answered*	Grant Reporting Meeting Minutes AGE-INFO Reports NILP I&R Reports	Process
	B. Identify Under- or Un-served Individuals in the Target Community	• Survey of Community Partners Advisory Board and Consumer Board* • Recommendations from CPAB and CB Outreach & Education Subcommittees* • # CPABs involved in information dissemination	Surveys Meeting Minutes Grant Reporting	Process

Objectives	Tasks	Indicator	Indicator Source	Indicator Type
	C. Develop Outreach Materials for Diverse Populations and Settings.	• #, type of outreach & education materials* • #, type staff appropriate to meet un/underserved populations* • # PSA's to target groups* • # community presentations and trainings for target groups*	Work Product Grant Reporting	Process Output
	D. Develop Community Presence, Legitimacy and Trust.	• Development of branding for ADRC* • # additional representative community organizations identified as possible members of CPAB** • # additional representative consumers identified as possible members of CB** • # of these additional representative community groups added to initial Community Partner Advisory Group** • # of additional consumers added to initial Consumers Board** • # cross-trainings provided to community stakeholders and non-traditional organizations	• Work Product • Grant Reporting • Meeting Minutes	Process Output

Objectives	Tasks	Indicator	Indicator Source	Indicator Type
3. Increase Community Communication and Collaboration	A. Hold Regular Meetings of Community Partners Advisory Board	• Quarterly meetings* • Satisfaction with group process and outcome at end of first year*	• Meeting Minutes • Board Guidelines & Principles • Surveys	Process
	B. Hold Regular Meetings of Consumer Board	• Bi-monthly meetings* • Satisfaction with group process and outcome at end of first year*	• Meeting Minutes • Board Guidelines & Principles • Surveys	Process
	C. Provide Inter-Agency Cross-Training and Information Sessions.	• Development of training curriculum* • # of training workshops conducted, by participating organization type* • Change in knowledge and satisfaction with workshops*	• Work Product • Surveys • Grant Reporting	Process Output
	D. Identify and Involve Community Organizations Not Currently Active in the Collaborative.	• List of potential members and affiliates who are not currently involved* • # of these community organizations contacted by staff, stakeholders and partners* • # of these community organizations added to initial members of CPAB and CB*	Grant Reporting	Process

Objectives	Tasks	Indicator	Indicator Source	Indicator Type
4. Coordinate Provision of Long-Term Support Services	A. Provide Referrals to Appropriate Public and Community Agencies.	• Report on current methods for referral and referral resources, gaps in referral resources, use of local resources through statewide and regional databases such as New England Index and 800-AGE-INFO* • Interviews with Community Partners Advisory Group, Consumer Board, and Agencies taking part in trainings* • Implementation of Referral Protocol* • #/type referrals made* • Consumer satisfaction with referral process**,***	• Work Product • Surveys • Grant Reporting	Process Output
	B. Provide Coordinated Case Management and Monitoring of Status.	• Implement case management protocol** • Development of case management tracking/outcome form** • # of financial eligibility determinations that are made for public programs** • # of clinical eligibility determinations that are made for public programs** • # Level of Care	• Work Product • Surveys • MMIS • HOMIS • NILP Database	Process Output

Objectives	Tasks	Indicator	Indicator Source	Indicator Type
		determinations by target group and reason for conduct*, *** • # enrolled in Medicaid or other program • Cost per case by type of service** • Changes in overall cost per case over time** • Consumer satisfaction surveys		
5. Implement MIS System	A. Analyze Strengths and Weaknesses in Current Management Information Systems of Participating Agencies.	• Identification of MIS strengths and weaknesses* • Creation of MIS strategy**	Work Product	Process
	B. Determine Feasibility of Implementing Electronic or Web-based Uniform Intake and Assessment Tool.	• Feedback on Real Choice Functional Assessment tool* • Gap and cost analysis • # meetings/discussions with State*	Work Product Grant Reporting Meeting Minutes	Process
6. Ensure Long-Term Viability and Sustainability of ADRC Model Within Massachusetts	A. Evaluate Existing Resources and Partner Agencies to Support Current Pilot	• Development of resource data base.*, **	Work Product	Output
	B. Develop Mechanism to Track Overall Project Costs	• Monitor budget reports (accounts payable/receivable/committed/unspent/ federal/state/matching/ on quarterly basis	Grant Reporting Financial Reports	Process

Objectives	Tasks	Indicator	Indicator Source	Indicator Type
7. Develop On-Going Evaluation Process	A. Conduct Ongoing Analysis of Goals	• Analysis of work plan outcome data gathered quarterly from Program Coordinator* • Informal report comparing stated objectives to outcomes on semi-annual basis* • Feedback to the CPAB and CB regarding program improvement.*	Grant Reporting Evaluation Reports	Output
	B. Conduct Ongoing Analysis of Satisfaction	• Surveys of changes in participant knowledge as well as satisfaction for inter-agency trainings.*,**	Surveys	Output
	C. Prepare Year-End Analysis of Goal Achievement	• Outcome data including a comparison of objectives to outcomes • Final report*,**.***	Surveys Work Product	Output
	D. Conduct Year-End Analysis of Satisfaction	• Analysis of satisfaction surveys across target groups including CPAB, CB, consumers in Years 2 & 3*,**	Surveys Work Product	Output