

# Evaluating local overdose prevention and response:

A toolkit to support evaluation planning and measures selection

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# Today's Presenters

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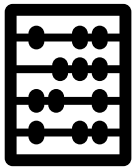


# Objectives

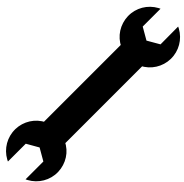
As a result of attending this session, attendees will be able to:



Describe current evaluation challenges



List some realistic indicators and approaches to constructing measures



Employ easy to use tools in evaluation discussions with partners

# Benefits of monitoring and evaluating overdose prevention and response initiatives

1. Improving programs
2. Demonstrating value to funders and other interested parties
3. Building the evidence base

# Challenges with monitoring and evaluating overdose prevention and response initiatives

1. Time and resource intensive
2. Short funding cycles
3. Data collection can create barriers to service provision
4. Expectations of funders and other interested parties
5. Blended and braided funding complicates reporting
6. Reliance on partners for data collection and reporting

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# The toolkit...

is a resource for any organization implementing or expanding overdose prevention and response strategies at the local level

Audience

provides concrete examples to stimulate creative thinking about indicators and measures at different stages of program development, implementation, and expansion

Purpose

# Toolkit background & development



- **Implementing Overdose Prevention Strategies at the Local Level (IOPSLL)**
  - Grant program serving over 40 LHDs in four cohorts 2019 – 2024
  - LHDs received funding and 18 months of technical assistance
  - LHDs required to complete a final evaluation report






# Toolkit background & development



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  - Evaluation plan development
  - One-on-one calls



# Toolkit background & development

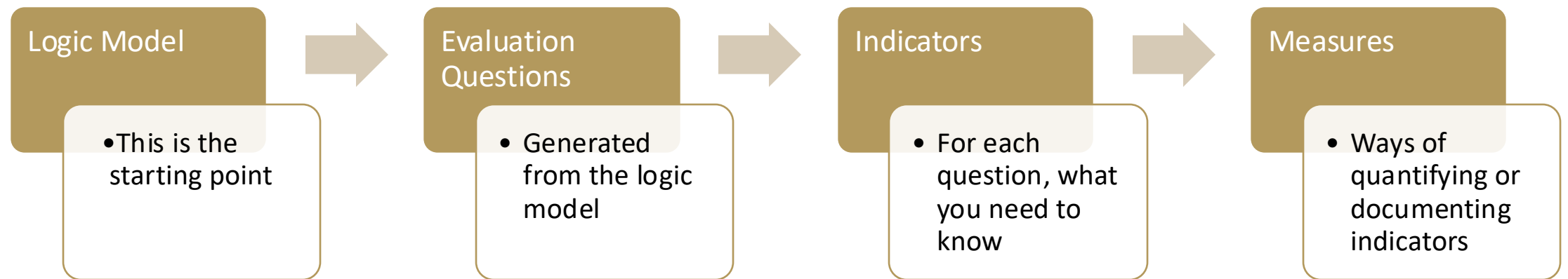
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- **Implementing Overdose Prevention Strategies at the Local Level (IOPSSL)**
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  - **Evaluation TA provided by Joslyn Levy and Associates (JLA)**
    - Evaluation plan development
    - One-on-one calls
  - **Toolkit compiles insights and methods from IOPSSL sites' program evaluations**
    - Realistic for LHDs and their partners
    - Realistic for short funding cycles



# Toolkit overview

- **About the Toolkit**
  - Purpose
  - Background
  - Audience & Intended Use
- **Constructing Meaningful Measures**
  - Start with your logic model
  - Identifying Measures
  - Assessing Measures
- **Common Data Sources**
- **Sample Measures**
  - Linkages to Care
  - Harm Reduction
  - Trainings: Harm Reduction & Anti-Stigma
  - Surveillance & Data Sharing
  - Community Events & Presentations
  - Developing & Sharing Community Resource Lists and Platforms

# Constructing meaningful measures



# Indicators and measures



Indicators are *markers of progress* toward the changes you hope to make with your initiative.



Measures are *discrete values* - quantitative and qualitative - that can be used to assess progress.

# Overdose prevention and response programs, activities, and indicator categories included in the Toolkit

## Strategy

## Programs or Activities

### Linkage to Care Programs

- Post-overdose outreach programs
- Case management and peer support programs

### Harm Reduction

- Overdose Education and Naloxone Distribution
- Naloxone boxes
- Harm Reduction Vending Machines

### Trainings: Harm Reduction and Anti-Stigma

- Trainings for professionals and organizations
- Community trainings

### Surveillance & Data Sharing

- Data sharing
- Data dashboards
- Establishing spike alert system

### Community Events and Presentations

- Tables at health fairs and presentations to community groups

### Developing and Distributing Community Resource Lists

- Printed resource lists for partner organizations
- Online community referral platforms

# Indicator categories by strategy

## Linkages to Care

- Reach
- Engagement
- Referrals
- Linkages to supportive services
- Follow up on client outcomes
- Participant experience
- Staff experience
- Partner experience

## Community Events and Presentations

- Reach
- Engagement
- Follow-up/feedback

## Harm Reduction

- Reach
- Distribution
- Utilization/Expansion
- Community perceptions/experience
- Partners perceptions/experience

## Trainings (HR and anti-stigma)

- Reach/training completion
- Participation/response rate
- Reaction/engagement
- Learning
- Behavior/application
- Perceptions of training
- Resource distribution

## Data Sharing, Dashboards, and Spike Alerts

- Data sources
- Partner engagement
- Distribution
- Utility (added value)
- Utilization

## Developing and Distributing Community Resource Lists

- Development
- Reach
- Distribution
- Utilization
- Experience



# Going from indicators to identifying measures

Indicator Category	Examples of Counts		Examples of Rates and Summary Measures
	Measuring Program Activity	Defining the Population	
Example of indicator category	<p><b>Step #1</b> Start by measuring what you're doing</p>	<p><b>Step #2</b> Identify priority populations</p>	<p><b>Step #3</b> Consider what comparisons you want to</p> <p><b>Step #4</b> Decide what you want to track over time</p>

# Example from the Toolkit: linkages to care case management and peer support programs



On-site linkage to care programs with peer support specialists



Peer recovery specialists embedded in homeless shelters



Hospital-based peer support service provision



Case management with individuals with criminal legal system involvement



Resource navigator and case management services for individuals with substance use disorder entering the community post-incarceration



Recovery coach case management services in a transitional housing setting

# Linkages to care: case management and peer support program indicators

- Reach
- Engagement
- Referrals
- Linkages to supportive services
- Follow up on client outcomes
- Participant experience
- Staff experience
- Partner experience



Indicator Category	Examples of Counts		Examples of Rates and Summary Measures
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Example of indicator category	Step #1 Start by measuring what you're doing	Step #2 Identify priority populations	Step #3 Consider what comparisons you want to  Step #4 Decide what you want to track over time

## Case Management and Peer Support Programs: Examples of Indicators and Measures

Indicator Category	Examples of Counts		Examples of Rates and Summary Measures
	Measuring Program Activity	Defining the Population	
Reach	<ul style="list-style-type: none"> <li>Number of individuals offered case management services, by referral or outreach sources</li> <li>Number of individuals seen by peer or case manager</li> <li>Number of new participants enrolled in the program</li> </ul>	<ul style="list-style-type: none"> <li>Number of individuals referred to the program</li> <li>Number of individuals contacted via outreach efforts</li> </ul>	<ul style="list-style-type: none"> <li>Of individuals contacted at outreach, change in the proportion of people accepting case management services over time</li> <li>Of individuals referred to the program, the percent seen by a peer within 48 hours of referral</li> <li>New enrollees as percent of monthly caseload</li> </ul>
Engagement	<ul style="list-style-type: none"> <li>Number of initial outreach attempts that resulted in engagement</li> <li>Number of individuals enrolled in short- and long-term case management, by referral source</li> </ul>	<ul style="list-style-type: none"> <li>Number of initial visits completed</li> <li>Number of individuals accepting case management or peer support services</li> </ul>	<ul style="list-style-type: none"> <li>Among individuals enrolled in case management/peer support services, percent that maintain engagement at least once a month</li> <li>Quarterly change in percentage of individuals enrolled in short-term case management services after initial visit is completed</li> </ul>

## Case Management and Peer Support Programs: Examples of Indicators and Measures

Indicator Category	Examples of Counts		Examples of Rates and Summary Measures
	Measuring Program Activity	Defining the Population	
Referrals	<ul style="list-style-type: none"> <li>Number of referrals, by type</li> <li>Number of individuals receiving referrals, by type</li> </ul>	<ul style="list-style-type: none"> <li>Active program caseload</li> <li>Number of new program participants at initial engagement</li> <li>Program participants identified eligible for specific referrals</li> </ul>	<ul style="list-style-type: none"> <li>Monthly trends in the number of individuals receiving peer support who are referred supportive services</li> <li>Change in the number of referrals made to partner organizations over time</li> </ul>
Linkages to supportive services	<ul style="list-style-type: none"> <li>Number of program participants who accessed services, by type and by service provider</li> <li>Number of program participants actively engaged with services, by type and by service provider</li> </ul>	<ul style="list-style-type: none"> <li>Active program caseload</li> <li>Number of clients referred to services, by type and by service provider</li> </ul>	<ul style="list-style-type: none"> <li>Among the individuals referred to treatment services, the number and percent that accessed treatment, quarterly</li> <li>Among individuals receiving peer support, percentage actively engaging with services each month</li> </ul>
Follow up on program participant outcomes	<ul style="list-style-type: none"> <li>Number of participants contacted at 30-day follow-up, 60-day, etc.</li> <li>Number actively engaged with peer/case manager at each follow-up</li> <li>Number whose needs for supportive services were met, by type</li> <li>Number completing the program</li> </ul>	<ul style="list-style-type: none"> <li>Active program caseload</li> <li>Number of participants that peer or case manager attempted to contact</li> <li>Program participants with needs for supportive services identified, by type</li> </ul>	<ul style="list-style-type: none"> <li>Month-to-month trend in the percentage of individuals active in the program at the 30-day follow up</li> <li>Average length of engagement for individuals in the program</li> <li>Percent of individuals completing the program</li> </ul>

## Case Management and Peer Support Programs: Examples of Indicators and Measures

Indicator Category	Examples of Counts		Examples of Rates and Summary Measures
	Measuring Program Activity	Defining the Population	
Staff experience	<ul style="list-style-type: none"> <li>• Staff perceptions of program effectiveness</li> <li>• Staff experiences with program design</li> <li>• Staff experiences with client engagement</li> </ul>	<ul style="list-style-type: none"> <li>• All staff</li> <li>• All staff that engage with clients</li> <li>• Peers/case managers</li> </ul>	<ul style="list-style-type: none"> <li>• Summary of staff experiences with the program, noting changes in participant engagement over time, compiled every six months</li> </ul>
Partner experience	<ul style="list-style-type: none"> <li>• Partner experience of program effectiveness</li> <li>• Partner perception of barriers and facilitators to client engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Partners involved in any part of the program, including:               <ul style="list-style-type: none"> <li>• EMS staff</li> <li>• First responders</li> <li>• CBO staff</li> <li>• Hospital staff</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Percentage of partners actively engaged in partner meetings where the program is discussed, quarterly</li> <li>• Key themes that emerged from informal interviews with partners to elicit feedback on their experiences with the program over time</li> </ul>

# Site Example I: Using standardized measures to compare case management service provision at two organizations

## Background

- A local health department expanded their peer navigation services at two CBOs serving different populations
- Program design: single peer encounter with individuals using substances to provide referrals to overdose prevention services and supports.
- The LHD developed a 'service encounter reporting' template for the CBOs to complete each month.

## Evaluation Approach

- Evaluation interest: to quantify the types of referrals offered to clients, and to understand similarities and differences between CBOs
- Monitoring and evaluation indicators: **reach, engagement, and referral** for each CBO, reported on a monthly basis.



# Site Example I

## Selected Indicators & Measures

### Reach:

- Number of encounters per agency, per month
- Number of encounters by location of service
- Demographics of participants that interacted with the program

### Engagement:

- Number and percent of clients who were provided the following services and supports:
  - Peer supports
  - Family supports
  - Transportation
  - Naloxone kits
  - Fentanyl testing kits
  - Community resource list
  - Education materials about MOUD, detox, naloxone, and substance use counseling

### Referrals:

- Number and percent of clients who were referred to the following services:
  - Substance use disorder services
  - MOUD program
  - Warm hand-off to out-patient service provider

## Using the Data

- Compared differences in client engagement and referrals for the two CBOs
- Assessed trends over time for overall program reach, including the types of services and supports provided.



# Site Example 2: Expanding peer navigation services in two homeless shelters

## Creating a Shelter to Recovery Program

- Program design: LHD embedded peer recovery specialists in two local homeless shelters to promote linkages to care, including treatment, harm reduction, medications for opioid use disorder (MOUD), and recovery support services

## Evaluation Approach

- Evaluation interest: to understanding if the model of embedding peers in a homeless shelter was effective in connecting individuals who use drugs to harm reduction and treatment services, and the extent to which clients engaged with the peers over time.
- Monitoring and evaluation indicators: **reach, referrals, linkages to care, and follow up.**

# Site Example 2

## Selected Indicators & Measures

### Reach:

- Number of shelter guests engaged by a peer recovery specialist each week
- Number of shelter guests that complete a peer engagement intake form

### Referrals and Linkages to Care:

- Of the shelter guests that completed an intake form:
  - Number and percent referred to harm reduction services at time of initial intake
  - Number and percent admitted to a treatment facility
  - Number and percent that accepted MOUD
  - Number and percent already on MOUD at time of intake
  - Monthly percentage of new shelter guests engaging with peer services

### Follow-Up Among Shelter Guests That Completed an Initial Intake:

- Number and percent reached at 30, 60, 90-day, 6-month and 12-month follow up
- De-duplicated count of shelter guests with at least 1 follow-up at 6 months

## Using the Data

- Monitor program implementation and track the number of shelter guests that completed a peer engagement intake form.
- Monthly trends in the percentage of new shelter guests engaging with peer services at different follow-up intervals.

# Discussion/Q&A