



Health Planning
Council OF NORTHEAST
FLORIDA

Evaluation & Monitoring Service Plan

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INTRODUCTION

THE VALUE OF CHOOSING HPCNEF

The Health Planning Council of Northeast Florida, Inc. (HPCNEF) offers unmatched expertise, proven methodologies, and a strong commitment to transparency in public health evaluation and monitoring. Our team has a proven track record of guiding local organizations through federally funded, multi-partner initiatives by combining thorough data collection, real-time performance tracking, and actionable insights. HPCNEF collaborated with local partners on the Promote, Protect, and Improve (PPI) Program in Duval County, as well as the Overdose Data to Action (OD2A) Program, utilizing our expertise in project management to monitor progress, evaluate partner efforts, and report results. Similar project monitoring and evaluation work has been completed in rural areas with the Health Resources and Services Administration (HRSA) Rural Communities Opioid Response Program and Rural Health Network Development projects.

By partnering with HPCNEF, organizations gain more than just a third-party evaluator—they gain a trusted ally focused on enhancing project impact, demonstrating return on investment (**ROI**), and ensuring long-term sustainability. We look forward to supporting your organization in transforming data into meaningful strategies that produce measurable results for our North-east Florida community.

ROI – return on investment

WHAT IS AN EVALUATION?

In public health, evaluation is a process that assesses the value or effectiveness of a public health project or any of its parts. Evaluations are flexible tools that can be tailored to an organization's needs and are used to enhance quality and measure effectiveness.

Evaluations are appropriate for:

- Improving project implementation
- Understanding the short-term and long-term effects of a project
- Providing information to stakeholders and other decision makers
- Increasing community support or awareness for initiatives
- Meeting project monitoring and reporting requirements for funders

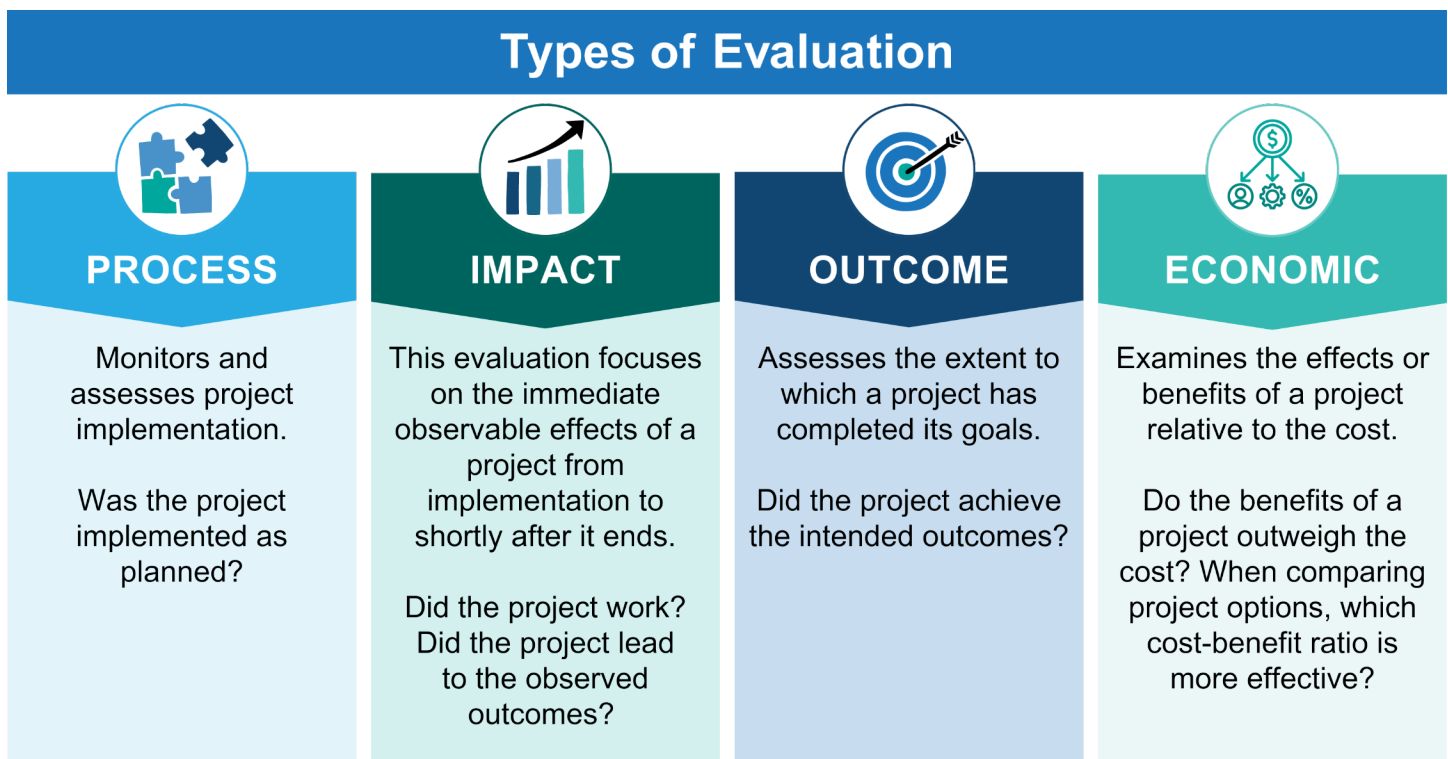
WHAT TYPES OF EVALUATION ARE THERE?

Different types of evaluations are designed to assess various parts of a public health project, such as the methods used to implement a community health project, the immediate observable effects that might occur once a project is implemented, or whether a project has achieved its intended outcomes or goals. The two main types of evaluation are **Formative** (assesses a project before it's fully implemented) and **Summative** (assesses the effectiveness of a project). But some of the most often used are *Process*, *Impact*, *Outcome*, and *Economic*. The infographic in *Exhibit 1* and the following text briefly describe these types of evaluations and their purposes.

Formative evaluation – a type of evaluation that assesses a project before it is fully implemented

Summative evaluation – a type of evaluation that assesses the effectiveness of a project

EXHIBIT 1: Types of Evaluation Infographic



Source: Health Planning Council of Northeast Florida, Inc., 2025.

PROCESS EVALUATION



Process Evaluation assesses the extent to which a project is implemented as planned. The evaluation identifies key components that are effective, for whom the project is effective, and what conditions make the project effective. Additional information can be gathered about any environmental (or external) factors that may have contributed to the success of the project or acted as barriers.

Using a process evaluation to monitor the implementation of a project can help the evaluators and project administrators understand the relationship between project components and project outcomes. Evaluators can use a strategic plan, project outline, or work plan for a grant to help identify what parts of the project to evaluate and what measures need to be used. The Health Planning Council of Northeast Florida, Inc. (HPCNEF) uses process evaluation to measure and monitor project components and deliverables for each grant and project.

IMPACT EVALUATION



Impact Evaluation typically focuses on a project's effectiveness for participants and whether a causal link can be established between the project and the observed outcomes. It goes beyond simply knowing if the project achieved its goals to examine what kinds of changes may have taken place during the project and determine if those changes are caused by the project or influenced by outside factors. Data collected during an impact evaluation can be compared to baseline data or that of a similar project to assess the project's impact on participants, particularly in relation to health behaviors. Therefore, impact evaluation would benefit stakeholders or project administrators looking to implement a project or policy change to influence health-related behaviors.

OUTCOME EVALUATION



Outcome Evaluation assesses whether a project, policy, or organization has achieved the intended outcome(s). This evaluation can be more long-term and generally does not establish **causality** (if a project is directly responsible for a specific outcome). Appropriate project outcomes should be selected to measure and monitor throughout the project, so that project administrators and evaluators can determine if a project's goals were met. Positive outcome evaluations could be used to justify the expansion of a project or policy or to secure funding for sustainability. Additionally, outcome evaluation results can drive recommendations for future project improvements.

causality – whether a project is directly responsible for a specific outcome

ECONOMIC EVALUATION



Economic Evaluations often examine the effects or benefits of a program relative to the costs of the program. These can be completed alongside other evaluations or on their own.

Evaluating a program's economic impact and cost-benefit ratio is important to:

- *Demonstrate ROI*: Shows funders, community partners, and policymakers how investments generate economic value for the region
- *Strengthen Grant Applications*: Quantifying expected economic impact bolsters proposals
- *Support Sustainability Planning*: Demonstrating a return on investment helps programs build a stronger case for securing long-term funding or gaining community support
- *Align with Local Priorities*: Many communities see economic development as a key to improving health and quality of life

The **Rural Health Information Hub's (RHIH) Economic Impact Analysis (EIA) Tool** (n.d.-a) assists communities, healthcare providers, and grant recipients in estimating the economic impact of new or existing programs. It determines how project spending (such as on salaries, supplies, and services) leads to job creation, income growth, and local economic development.

By modeling direct, indirect, and induced impacts, the tool offers a data-driven way to demonstrate how grant dollars flow through a local economy, enabling users to turn funding into a compelling story of measurable impact.

At HPCNEF, the EIA Tool is a key component of our project evaluation framework. Using the EIA tool goes beyond just monitoring outputs; it evaluates the broader economic impact of initiatives. Whether implementing food access projects, stigma-reduction campaigns, or mobile health outreach, utilizing the EIA Tool enhances the quality of project evaluation by providing actionable, objective data and meaningful results in:

- Evaluation booklets showcasing community-level ROI
- Impact reports for stakeholders, policymakers, and funders
- Communication on the sustainability potential of projects through calculated economic multipliers

This approach helps tell a more compelling story about how public health investments improve lives and boost economies. It appeals to funders, strengthens advocacy efforts, and aligns our mission with the long-term well-being of the communities we serve.

RHIH – Rural Health Information Hub

EIA – Economic Impact Analysis Tool

EVALUATION DESIGN AND PROCESS

CDC – The Centers for Disease Control and Prevention

The Centers for Disease Control and Prevention (CDC) published an evaluation framework that is widely used by public health professionals. The CDC framework for project evaluation encourages collaborative engagement, learning from insights obtained from the evaluation, and adhering to recommended standards and best practices (CDC, 2024). In addition, the CDC provides a six-step process to develop a high-quality evaluation (*Exhibit 2*).

EXHIBIT 2: CDC Evaluation Framework

CDC Evaluation Framework



Source: Health Planning Council of Northeast Florida, Inc., 2025.

The Community Toolbox from the Center for Community Health and Development at the University of Kansas (n.d.) also offers an easy-to-use framework for project evaluation and encourages including those involved in project operations, those served or affected by the project, and the primary intended users of the evaluation (stakeholders, administrators, or decision-makers). Other potential stakeholders to invite into the evaluation process include partners or community groups, grant or funding agency personnel, or university-based researchers. Finally, the Rural Health Information Hub (n.d.-b) provides helpful information for evaluating rural community health projects.

Understanding the intended users and uses of the evaluation, along with the components of the project being evaluated, is

crucial. These details help determine the purpose and type of evaluation to use. After selecting the appropriate evaluation type, questions can be developed and prioritized, leading to the creation of an evaluation design. The success of the evaluation depends on asking the right questions, collecting relevant data to support conclusions, and then sharing and acting on the findings.

DEVELOPING THE EVALUATION QUESTIONS & DESIGN

The evaluation design will depend on what kinds of information the evaluation team wants to collect and what the evaluators and stakeholders hope to learn from the project. The evaluation questions will guide the evaluation, provide purpose, and be a reference point for the evaluation team during the process. Before developing evaluation questions and planning the design, the evaluation team should gather and try to understand what information already exists (such as in a CNA, CHA, CHNA, or previous evaluation; see table in *Exhibit 3*) that could help generate questions and have an accurate project description.

The project description and context assessment should include the following:

- Individuals involved with or impacted by the project and evaluation
- Project purpose, history, environment/contextual factors, specific features that might be important, cultural considerations, and any relevant data
- Project inputs/resources, activities, outcomes, and project progress
- Resources and time available to conduct an evaluation

Once a project description has been developed, the evaluation team focuses its efforts by asking specific questions. These questions will help clarify the objectives and goals of the evaluation process and lead to a defined purpose and evaluation design. *Exhibit 1* lists some example questions for each evaluation type.

DATA COLLECTION & ANALYSIS

The methods used to collect data during an evaluation depend on the type of evaluation, the kinds of data needed, and the available time and resources for the evaluator(s). It is important to use more than one data collection method to gather as much information as possible and to prevent gaps. Data can be collected through surveys, one-on-one interviews, focus groups, project observations, project data, and other public health data

EXHIBIT 3: Assessments

ASSESSMENT EXAMPLES

Community Needs Assessment (CNA) – an assessment conducted to understand the health status and needs of a specific community. This assessment can analyze a specific area of health in a single county service area or in a multi-county region.

Community Health Assessment (CHA) – a systematic assessment designed to identify priority community health and quality of life issues using primary and secondary data from a variety of existing sources

Community Health Needs Assessment (CHNA) – an assessment conducted every three years by a nonprofit hospital or other entity. This process collaborates with the community to identify and analyze health needs of the local populations the entity serves.

CQI – continuous quality improvement

sources. Some project data may be collected regularly for ongoing monitoring. The evaluation team will analyze both quantitative and qualitative data, which will be included in the final report.

MONITORING PROGRESS

Some evaluations require monitoring progress to support **continuous quality improvement (CQI)**. This ongoing assessment of a project and its components helps evaluators understand what is working well and what may need adjustments for better outcomes. Conducting monitoring during a project's implementation is crucial for gauging its quality and effectiveness while it is happening. It also enables evaluators to identify connections to impacts or outcomes measured later. Funders and decision-makers might request regular updates on a project's performance or at least require that a monitoring system be in place. HPCNEF develops data dashboards and monitoring tools to track deliverables and gather data throughout a project. These monitoring tools assist the project team not only in meeting deliverables but also in gathering information for project evaluation. Data can be collected from progress reports, observations, and invoices. Regarding frequency, monitoring may occur quarterly through data collection and tracking of project components such as deliverables, services, compliance, and other requirements. It can also be done annually to evaluate a project, combining elements of quarterly monitoring while considering additional legal and financial factors.

HPCNEF EVALUATION FRAMEWORK

HPCNEF provides structured, transparent, and insight-driven project evaluation services. As an experienced evaluator for federally funded, multi-partner initiatives, including the Health Resources and Services Administration (HRSA) Rural Communities Opioid Response Program (RCORP) and Rural Health Network Development (RHND) projects, HPCNEF employs a compliance-focused framework that promotes accountability, real-time performance monitoring, and data-informed decision-making.

Project evaluation services follow a seven-step model, shown in *Exhibit 4*, designed to support grant compliance, adaptive project learning, and long-term sustainability. Using this framework and incorporating elements of the CDC evaluation framework, a custom plan will be crafted for each evaluation.

EXHIBIT 4: HPCNEF EVALUATION FRAMEWORK

- 1 Preparation**
 - Design of customized data collection tools and templates
 - Provide technical assistance to partners to ensure consistent data reporting
 - Create Excel dashboards that meet contractual goals and reporting requirements
- 2 Data Collection**
 - Collect data as determined in the Preparation stage
 - Aggregate data by project partners or sources
 - Verify and clarify data accuracy by the lead evaluator
 - Approve verified data to promote transparency and accountability
- 3 Tracking**
 - Utilize customized dashboards for monitoring work plan milestones, performance measures, and deliverable status
 - Maintain dashboards as internal tools for project management and as external visuals for sharing progress with funders and stakeholders
- 4 Monitoring, Process, and Outcome Evaluation**
 - Track project fidelity, activity completion, timeline adherence, and partner engagement as part of ongoing Process Evaluation
 - Assess changes in knowledge, behavior, service use, and health outcomes aligned with project goals
 - Review and interpret data in collaboration with Grant Technical Assistance Advisors, Contract Managers, and Grants Management Specialists
- 5 Process Improvement**
 - Regularly review collected data to identify trends, gaps, and opportunities for enhancing project implementation
 - Share findings with the project team to support CQI
 - Make adjustments as needed to the Evaluation Plan, Data Collection, or project monitoring to ensure alignment with project goals and improve effectiveness
- 6 Reporting**
 - Work plan deliverables reviewed by project partners, project director, and grants administrator prior to submission
 - Develop final evaluation report detailing purpose, methods, data collection and analysis, and recommendations
- 7 Secure Storage**
 - No data that can identify individuals is collected or stored
 - Only aggregate-level data is accepted and stored for seven years in accordance with HIPAA, cybersecurity standards, and internal data management protocols

WHAT DOES A FINAL EVALUATION LOOK LIKE?

The final evaluation typically includes a written report as well as a presentation to the stakeholders and decision-makers involved. The evaluation report should have a project description, methods used to evaluate the project, a discussion of data collection and analysis, and next steps, including communication and dissemination of results. Depending on the type of evaluation used and any requirements from decision-makers or funders, further details may be needed about ongoing progress monitoring and any action steps that need to be taken to address needs identified in the evaluation. The report should be presented to the public and those impacted by the project and submitted in a timely manner to the funder (if applicable).

EVALUATION PLAN EXAMPLES

The following outlines provide example evaluation plans for various projects. Each evaluation plan will be tailored to meet an organization's unique needs. Additionally, a funding agency may have specific requirements that must be satisfied or a preference for format. It is important to note that a project can have multiple evaluations, which may differ in type or be similar in type but conducted at different intervals.

OUTLINE EXAMPLE: PROJECT MONITORING

PHASE 1

- Review contract, deliverables, and other relevant documents (e.g., work plan, scope of work)
- Develop a **data dashboard** for monitoring project progress using the HPCNEF template
 - Add deliverables and other relevant activities that need to be tracked
 - Follow the data dashboard template to fill out the rest of the document with required details (e.g., due dates, progress, notes)
- Develop a **project monitoring tool** with the project activities listed
 - Add deliverables and other relevant activities that need to be tracked
 - Determine how each activity will be tracked
 - Progress reports, observations, invoices, or other methods
 - Follow the project monitoring tool template to fill out the rest of the document

Data dashboard – a digital spreadsheet that tracks quantitative progress towards project goals

Project monitoring tool – a digital document used by the project team that outlines deliverables, tasks, metrics, and more

- Review the dashboard and tool with the project team to ensure the document meets organizational and funder requirements, standards, and/or protocols
- Store the dashboard and tool in a shared drive folder and share it with project team members as necessary

PHASE 2

- Collect data and input progress into the data dashboard and project monitoring tool
- Monitor project activities to ensure the project is on track to meet deliverables and other requirements
- Communicate with the project team (including funders, sub-contractors, and administrators) to stay up to date with progress and discuss any adjustments that need to be made

PHASE 3

- Create a **project report** to summarize the project, activities, monitoring progress, and outcomes
 - List any necessary details, and consider including the data dashboard and project monitoring tool documents for reference
- Review the report with the project team to ensure all appropriate information is included
- Communicate the results of the report to the project team and store all documents in the shared drive folder

Project report – a formal narrative summary of the project, including descriptions of activities, progress, and outcomes

See [Exhibit 5](#) for a general timeline for Project Monitoring.

EXHIBIT 5: OUTLINE EXAMPLE PROJECT MONITORING

Timeline depends on project specifics

PHASE 1

- Review contract, deliverables, and other documents
- Develop and complete data dashboard
- Develop project monitoring tool
- Review tools with project team
- Store tools in shared drive folder

PHASE 2

- Collect data
- Input progress
- Monitor activities in context of deadlines and requirements
- Communicate updates and changes with team and stakeholders

PHASE 3

- Create project report
- Review project report with team
- Communicate report results

*Duration depends
on project*

*Duration depends
on project*

*Duration depends
on project*

OUTLINE EXAMPLE: PROJECT-SPECIFIC

PHASE 1 (2 months)

- Hold initial meeting for project review, expectations, discussing evaluation plan and design, data collection, communication, and timeline
- Review the project, activities, contract, deliverables, and other relevant documents (e.g., work plan, scope of work, budget)
- Develop an **evaluation plan**
 - Determine how the project will be evaluated
 - Develop data collection tools
 - Establish evaluation timeline
 - Create a communication plan to disseminate the results

PHASE 2 (duration depends on the project)

- Data Collection & Project Monitoring
 - If the evaluation occurs during the project, implement a project monitoring plan (as described in the example above)
 - Collect data and input progress into the data dashboard and project monitoring tool
 - Monitor project activities to ensure the project is on track to meet deliverables and other requirements
 - Communicate with the project team (including funders, subcontractors, and administrators) to stay up to date with progress and discuss any adjustments that need to be made
 - If the evaluation occurs at the end of the project, collect the necessary data as outlined in the evaluation plan
- Data Analysis
 - Analyze the data collected from the selected methods and project monitoring

PHASE 3 (3 months)

- Create an **evaluation report** to summarize the project, activities, monitoring progress, data collection and analysis, and recommendations
 - List any details necessary and consider including the data dashboard, project monitoring tool, and data collection tools for reference
- Review the report with the project team to ensure all appropriate information is included
- Communicate the results of the report to the project team and store all documents in the shared drive folder

See [Exhibit 6](#) for a general timeline for a project-specific evaluation plan.

Evaluation plan – a structured outline to describe how a project’s effectiveness and outcomes will be measured, including evaluation methods, data collection tools, timeline, and approach for communicating results

Evaluation report – a formal narrative summary of the project, including descriptions of activities, observed progress, and recommendations

EXHIBIT 6: OUTLINE EXAMPLE PROJECT-SPECIFIC

Timeline depends on project specifics

PHASE 1

- Hold initial meeting
- Review the project, contract, deliverables, and other documents
- Develop an evaluation plan

PHASE 2

- Implement project monitoring plan
- Collect data and input progress
- Analyze collected data
- Monitor activities in context of deadlines and requirements
- Communicate updates and changes with team and stakeholders

PHASE 3

- Create evaluation report
- Review project report with team
- Communicate report results

2 months

***Duration depends
on project***

3 months

OUTLINE EXAMPLE: COMMUNITY HEALTH IMPROVEMENT PLAN

PHASE 1 (2 months)

- Hold initial meeting for project review, expectations, discussing evaluation plan and design, data collection, communication, and timeline
- Review the CHIP activities and other relevant documents (e.g., scope of work, budget)
- Develop a project monitoring tool with the project activities listed
 - Add deliverables and other relevant activities that need to be tracked
 - Determine how each activity will be tracked
 - Progress reports, observations, or other methods
 - Follow the project monitoring tool template to fill out the rest of the document
 - Review the tool with the project team to ensure the document meets organizational and funder requirements, standards, and/or protocols
 - Store the tool in a shared drive folder and share it with project team members as necessary
- Develop an evaluation plan for Phases 2 and 3
 - Determine how the CHIP work will be evaluated and how HPCNEF can best support the CHIP project team
 - Develop data collection tools for evaluating CHIP work and implementation
 - Establish an evaluation timeline
 - Create a communication plan to disseminate the results

CHIP – Community Health Improvement Plan; a structured multi-year plan to improve community health and quality of life based on the results of a CHA

PHASE 2 (12 months)

- Implement the evaluation plan developed in Phase 1
 - Monitor CHIP progress for 12 months after the final CHIP report is submitted
 - CHIP monitoring will repeat each year
 - Assist the CHIP project team and workgroups with monitoring progress on CHIP goals, strategies, and activities
 - Supports the CHIP team and workgroups in continuing development and active participation in CHIP efforts, while easing the transition of CHIP to the community. Aims to reduce barriers, increase CHIP participation, and enhance CHIP outcomes.
 - Provide technical assistance for the CHIP team with meetings, data reporting, and project implementation

- Communicate with the project team to monitor progress, discuss any adjustments that need to be made to the CHIP work, and store all documents in the shared drive folder

PHASE 3 *Annual Monitoring* (occurs every year throughout CHIP cycle)

- Provide technical assistance for the CHIP team with meetings, data reporting, communications, and project implementation
- Data Collection & Analysis
 - Collect and analyze data with the methods selected in Phase 1
- Create an evaluation report to summarize the CHIP, activities, monitoring progress, data collection and analysis, and recommendations
 - List any details necessary, and include the project monitoring tool and data collection tools for reference
 - Review the report with the project team to ensure all appropriate information is included
- Communicate the results of the evaluation to the CHIP team and workgroups, and store all documents in the shared drive folder

See *Exhibit 7* for a general timeline for a Community Health Improvement Plan.

REFERENCES

- Centers for Disease Control & Prevention. (2024, August 20). *CDC Program Evaluation Framework*. CDC Approach to Program Evaluation. <https://www.cdc.gov/evaluation/php/evaluation-framework/index.html>
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EXHIBIT 7: OUTLINE EXAMPLE COMMUNITY HEALTH IMPROVEMENT PLAN

Timeline depends on project specifics

PHASE 1

- Hold initial meeting
- Review CHIP activities and other documents
- Develop project monitoring tool
- Develop evaluation plan for Phases 2 and 3

PHASE 2

- Implement evaluation plan
- Assist CHIP project team and workgroups with progress monitoring
- Provide technical assistance for CHIP team
- Communicate with CHIP team and adjust activities as needed

ANNUAL MONITORING PHASE 3

- Continue technical assistance for CHIP team
- Collect and analyze data
- Create evaluation report
- Review project report
- Communicate report results with CHIP team and workgroups


2 months


12 months

***Annually throughout
CHIP cycle***

CONTRACT WITH US

By joining forces, organizations and businesses can work together to implement sustainable solutions that meet the community's needs. With the Health Planning Council of Northeast Florida's expertise in data-driven insights and strategic planning, potential partners have a unique opportunity to contribute to initiatives that will have a lasting, measurable impact on the well-being of your service area and beyond. As your county's local health council, HPCNEF operates as a non-competitive, or sole source, contractor—meaning local governments and other entities are able to engage directly with HPCNEF without the laborious and often time-consuming process requirements to solicit competitive proposals (such as bids or Requests for Proposals) This allows for a streamlined contracting process, saving both time and administrative effort while ensuring access to our expertise in public health assessment, planning, and data analysis.

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WHO WE ARE

The Health Planning Council of Northeast Florida, Inc. (HPCNEF) is the local health council that represents Baker, Clay, Duval, Flagler, Nassau, St. Johns, and Volusia counties. Established in 1982, HPCNEF is one of eleven local health councils mandated by Florida State Statute 408.033. Our purpose is to dedicate resources and expertise to regional health utilization data management, health planning and research, community organizing, health promotion, and awareness programs in a seven-county region of Northeast Florida. HPCNEF is guided by the U.S. Department of Health and Human Services (HHS), the Office of Disease Prevention and Health Promotion (ODPHP)'s Healthy People Initiative, and the Agency for Health Care Administration (AHCA).

