Measuring Peer Recovery Outcomes

TOOLKIT

Showing the Impact of Peers in Meaningful Ways

August 2024

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Authors: Christina Chavez, Jenna Lee Mathews, Stacey McClellan, Julia Simhai

For More Information:

Peer Recovery Center of Excellence: Maureen Nichols, mnichols@austin.utexas.edu
OMNI Institute: projects@omni.org

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Introduction

Project Background

Peer Recovery Center of Excellence (PR CoE)

The Substance Abuse & Mental Health Services Administration has funded the Peer Recovery Center of Excellence (PR CoE) since 2020 to provide training and technical assistance to the peer workforce, recovery community organizations, and other organizations in the recovery ecosystem to support the implementation of peer recovery support services. The PR CoE is housed at the University of Missouri Kansas City as part of its Collaborative to Advance Health Services.

The PR CoE divides its activities into five focus areas, each overseen by a partner. The first three focus areas prioritize training and technical assistance for three groups of constituents: the peer workforce, recovery community organizations, and other organizations in the ecosystem of recovery, such as substance use treatment organizations, healthcare facilities, and more. The other two focus areas promote the adoption of evidence-based practice and practice-based evidence around peer recovery support services and champion diversity, equity, and inclusion in the provision and receipt of peer recovery support services and in the work of the PR CoE itself.

OMNI Institute

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Since 2019, OMNI has partnered with various organizations to develop and implement a robust and unique strategy for evaluating peer recovery services in ways that prioritize recovery-focused values and reflect multiple definitions of “success” in recovery. OMNI has created various resources related to our work in this area, found at omni.org/our-work. OMNI is thrilled to partner with PR CoE on this toolkit to support organizations and programs committed to high-quality, meaningful evaluation of peer recovery support services.

What is a Toolkit?

A toolkit is a set of resources designed to help communities achieve a particular goal or task. In the case of this Measuring Peer Recovery Outcomes toolkit, we have compiled various resources on identifying program values and related outcomes, existing evaluation tools, implementation, and sustainability strategies. The audience for this toolkit is peer recovery support programs, peer recovery program partners, and anyone invested in tracking outcomes related to peer recovery support services.

The development of this toolkit drew on multiple sources of information, including research conducted by OMNI staff, a comprehensive literature review, peer recovery evaluation work implemented in the field, input from PR CoE, and a Peer Recovery Advisory Group. Throughout this toolkit, you will find resources on peer recovery-specific evaluation innovations learned from first-hand experience adapting evaluations to support the unique needs of peers.

How to Use This Toolkit

This toolkit is designed to be as accessible as possible to benefit different audiences. The toolkit was created in the context of substance use but is likely applicable across many areas of peer recovery support. Begin by reading the toolkit carefully and identifying the strategies most relevant to your program or desired approach to evaluation. If you read an electronic version of this toolkit, references, and outside resources can be accessed via embedded links directly in the text. Throughout this toolkit, you will find topic-specific references and other resources.

What is Peer Recovery?

Although there are many definitions of the term recovery, for this toolkit, recovery is defined as a process of change through which individuals improve their health and wellness, live autonomous lives, and strive to reach their full potential. Similarly, the concepts of peers and their services have varied definitions and terminologies. In this toolkit, the term **Peer Recovery Support Specialist (PRSS)** refers to trained persons providing recovery services who have lived/living experience with substance use and are currently in recovery. **Peers** relate to the individuals PRSSs work with and support. Peer recovery support services are distinguished from treatment and other clinical modalities. Substance use or mental health treatment services are provided by individuals with training in a clinical setting. In contrast, PRSSs are credentialed to provide peer recovery support based on their lived experience, which may complement other training and credentialing. Though they also receive training and certification, PRSS expertise primarily lies in their experience living with and through life-disrupting substance use and/or mental health challenges and engaging in the recovery process. In this way, PRSSs are the personification of the values underlying the recovery orientation.

Glossary of Terms

The following terms can have varying definitions depending on context and purpose. We have provided definitions for this toolkit that align with the Peer Recovery Center of Excellence and program evaluations.

1. **Data:** The facts, information, or numbers collected through an evaluation or research process. Data is often analyzed and the findings are used to inform decisions about a program or organization.
2. **Data analysis:** Utilizing statistics to understand and interpret data to gain insights and make decisions.
3. **Logic model:** A tool that shows the purpose of a program or organization by demonstrating the logical relationship between the need/problem being addressed, the strategies implemented by the program, and the changes or desired outcomes expected from the program.
4. **Mission:** A statement of the general values and principles that guide a program or organization.
5. **Objectives:** Describe the strategies or interventions used to achieve a program's goals.
6. **Outcomes:** Describes how a participant should be impacted by the program. For example, what should they know or be able to do because of a program?
7. **Partners:** Individuals or communities invested in the success of a program or organization.
8. **Peer:** The individual a Peer Recovery Support Specialist works with and supports.
9. **Peer Recovery Support Specialist (PRSS):** Trained persons providing recovery services who have lived/living experience with substance use and are currently in recovery.
10. **Program evaluation:** A process that increases understanding of a program or service.
11. **Recovery:** A process of change through which individuals improve their health and wellness, live autonomous lives, and strive to reach their full potential. (Definition provided by PR CoE)
12. **Sustainability:** The ability of a program to maintain performance at a desired level over time.
13. **Values:** The concepts or experiences most important to a program or organization and drive the services and supports offered. Some examples of recovery-oriented values include self-determination, empowerment or choice, community integration, hope, and self-efficacy.
14. **Values-Driven Evaluation:** An evaluation process that relies on the program's values to determine the focus and priorities of the evaluation.

Evaluation: An Overview

Introduction to Program Evaluation

Funders or organizations often require program evaluations, but the process can still be manageable and meaningful. One bonus of engaging in program evaluation is that you can see if your efforts are having the impact you expect and adapt as needed. Some other benefits of evaluations include:

- Provide an opportunity to reflect on progress
- Build capacity and engage the community
- Influence policymakers and funders
- Understand what does and does not work
- Tell us where we are and where we should go
- Support funding sustainability
- Strengthen accountability

What is a Program Evaluation?

What is the first thing that pops into your head when you hear the word "evaluation" in a program context? Chances are unlikely that it is something positive. But, when you break it down, a program evaluation is simply a process that increases our understanding of a program or service. So, really, it is about learning!

Program evaluations typically have two goals:

- Improve program design and implementation
- Demonstrate program impact

No matter how important your work is, if your program has a flawed design or is not implemented correctly, you will likely be unable to achieve its intended goals. Evaluations help gather the information needed to ensure your program is reaching its goals. Additionally, evaluations help measure a program's impact on its intended audience (e.g., reducing youth substance use). Through the evaluation process, you can share with vested partners, using information and data, how your program is making an impact.

Program Evaluation Resources:

- CDC: Office of Policy, Performance, and Evaluation — GO TO LINK
- Program Evaluation Standards and Cultural Competence — GO TO LINK
- A Framework for Program Evaluation: A Gateway to Tools — GO TO LINK

Conveying the Value of Peer Recovery Support Services

Why is it important to show the value of peer recovery support services?

Demonstrating the value of peer recovery support services is essential on multiple levels—for the program itself and the larger peer support field.

IMPORTANCE FOR THE PROGRAM

- When evaluating a program or service, focusing on the value of peer recovery support services can inform the direction of services. Peer recovery support programs are unique depending on location, intended population, and focus, so examining their value can help guide the types of services needed and identify the funding that would be most appropriate to leverage.
- Showing the value of peer recovery support services can also enhance program sustainability. Demonstrating how critical peer recovery support services are to individuals, families, and communities helps generate buy-in for your program and an understanding that it should be prioritized for funding and support. Showing value can help increase the availability of peer recovery support services. When programs demonstrate their value, communities are more likely to invest in expanding these efforts to impact more individuals and families.

IMPORTANCE FOR THE FIELD

- Little research exists comparing peer recovery support with other recovery supports. Demonstrating the value of peer recovery support services can help other fields learn about their effectiveness.
- The field is growing due to increased education about the effectiveness of peer recovery support services. Demonstrating value can help inform the field's growth. Peer recovery support services evolve depending on community needs, and sharing experiences helps develop and educate the field.
- Demonstrating a program or service's value can also help address the stigma peers face. It solidifies the need for these professionals and explains how they are uniquely qualified and successful at supporting individuals and families with substance use-related concerns.

Why is measuring the value of peer recovery support services so challenging?

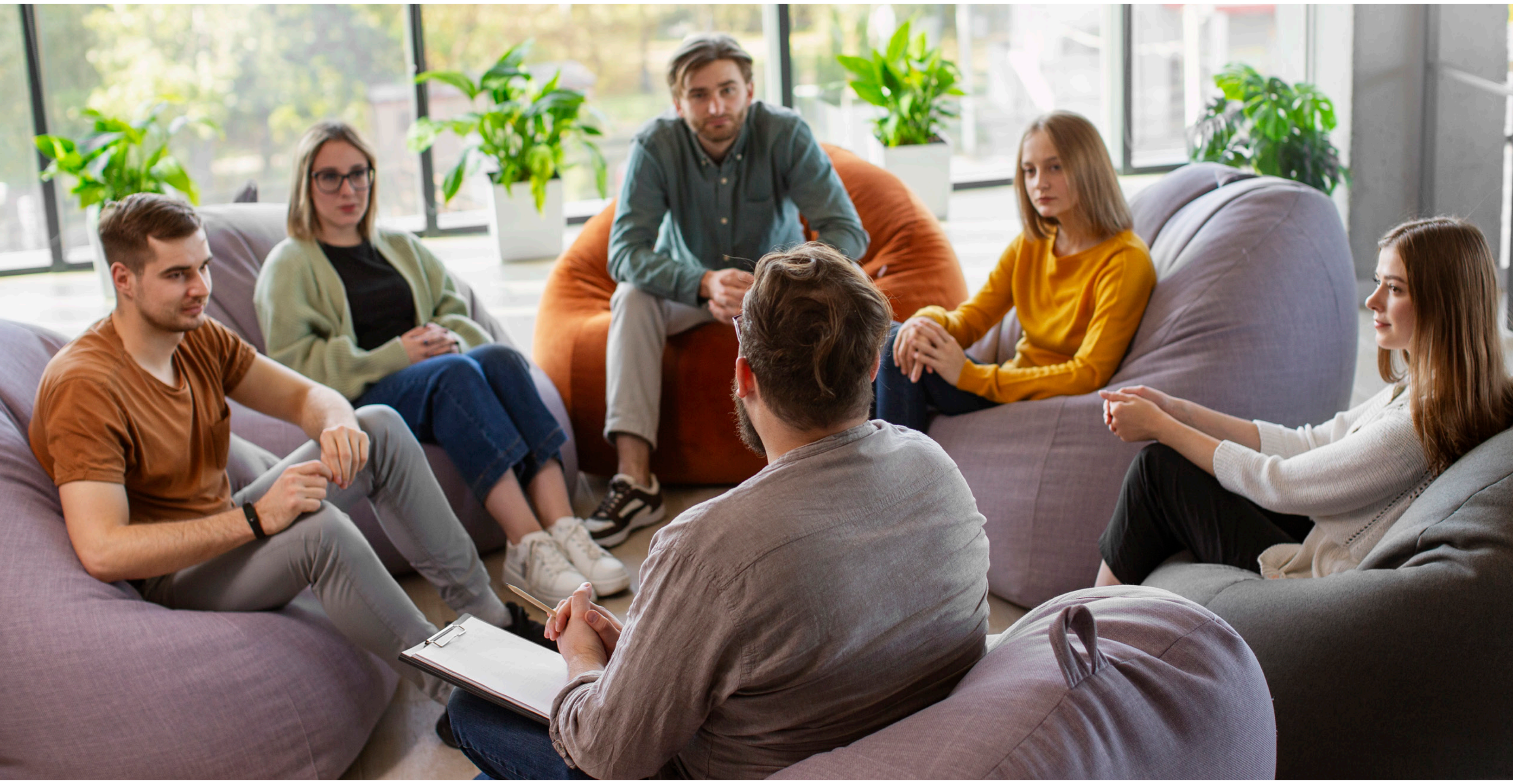
Although it is important to show the value of peer recovery support services, it can be challenging and resource-intensive to measure meaningfully. Peer Recovery Support programs often struggle with evaluation because:

Success in peer recovery support programming is often subjective. Everyone receiving peer recovery support services has different goals and definitions of recovery.

Peer recovery support programs adapt to individual needs, making consistent outcomes hard to track. PRSSs honor many pathways to recovery, which is a primary strength of these programs. However, this makes collecting meaningful results across individuals challenging.

There is a lack of standardization in the peer recovery support field because programs have different theories about what works. However, standardization is often not the goal.

- Many of the most valuable aspects of peer recovery support services are the same features that interfere with standardization. For example, a defining role of peer recovery support services is the PRSS's lived experience, which further individualizes the content and methods of their services.



Values-Driven Evaluations

Recovery services are, by nature, driven by recovery values, and evaluation efforts should align with these core values to ensure programs and services are achieving their intended goals.

What makes some evaluation values-driven?

Values-driven evaluations ensure that the questions asked to determine success are consistent with the program's values and goals. This method can help overcome some challenges in measuring peer recovery support services. So, what does that look like?

1. **Intentional alignment with the program's purpose and goals.** Take the time and energy to solidify the program's purpose and goals and then align the evaluation to them.
2. **Program values influence the evaluation.** Ensure that the program's values influence evaluation questions, processes, and outcomes at every step of the way.
3. **Focus on impact.** Highlight the individualized elements that make the services impactful by measuring what makes peer recovery support programs unique.

When a values-driven process is used to identify and measure peer-specific outcomes, programs, and organizations can evaluate the impact of peer recovery support services without jeopardizing the individualized elements that make these services so powerful.

Values-Driven Peer Recovery Support

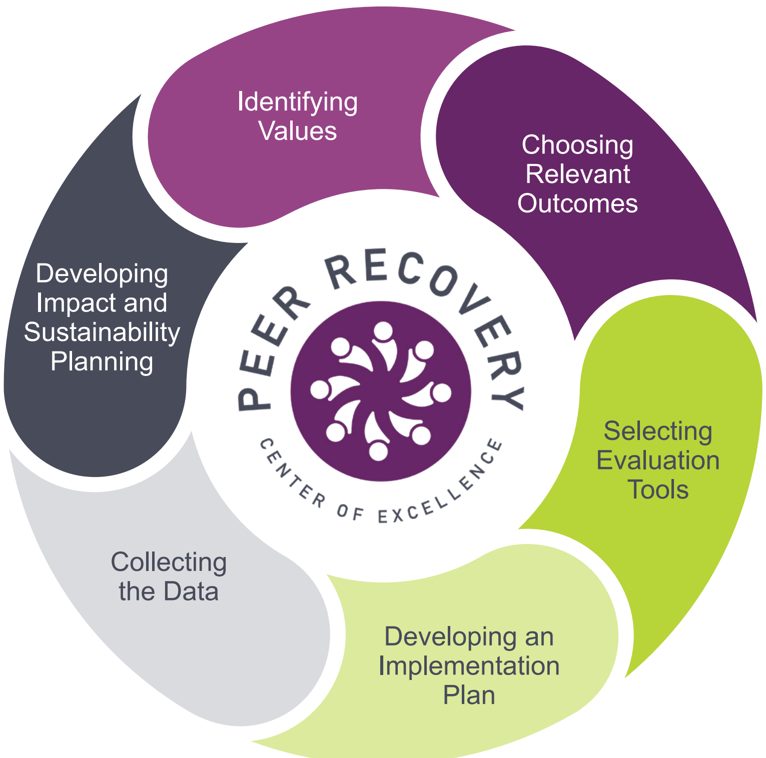
- A common value of peer recovery support programs is the self-determination of recovery goals – essentially, **recovery is not a specific one-size-fits-all definition, and each person should be able to define it.**
- **Traditional evaluation may attempt to standardize the goals** into common outcomes like number of days sober, cravings levels, and employment status.
- **Values-driven evaluation focuses on measuring self-determined recovery goals**, perhaps by looking at progress toward self-identified goals or a more general concept like recovery capital.

How do you implement a values-driven evaluation?

There is no single best way to implement a values-driven evaluation, but there are ways to engage in the process of determining the best way for your program/organization. This toolkit provides more details on establishing a values-driven evaluation, specifically for peer recovery support services, utilizing a six-phase process. The phases outlined below walk through the steps of engaging in a comprehensive values-driven evaluation but are meant to be flexible and adaptable based on the size of your program, stage of implementation, and experience with program evaluations. You do not have to start at phase one, stop at phase six, or follow them in the order in which they appear. As program, community, and funder needs change, you can jump to whatever phase best serves your program needs.

Implementing Values-Driven Evaluation for Peer Recovery Support Services

Below are six main phases to implementing a values-driven evaluation for peer support services:



1. Identifying Values
2. Choosing Relevant Outcomes
3. Selecting Evaluation Tools
4. Developing an Implementation Plan
5. Collecting the Data
6. Developing Impact and Sustainability Planning

Each program might start or move through the phases differently depending on where they are developing their evaluation process. For example, some programs might have already identified their core values and aligning outcomes, so they would move straight into selecting an evaluation tool. Others may know the tool they will use but might need to return to ensure it aligns with their core values. Additionally, the final phase is not intended to be an endpoint but rather a place to reflect and determine what might be needed from the other phases to ensure program sustainability.

The following section will review each phase for developing a values-driven peer recovery support services evaluation. Each section will:

- **Define the phase**
- **Provide related research**
- **Demonstrate what it looks like in practice**
- **Allow you to build out your process through an exercise**

Phase One: Identify Values

Phase One: Identify Values

What are program values?

Program values are the principles that guide the goals of a program. If everything in your program worked precisely as intended, what would participants experience?

It is also essential to consider how your program values will influence your evaluation process, including how the information is collected. For example, your program might prioritize sustainability and staff capacity or utilize a low-cost evaluation tool.

The next step in developing a values-driven evaluation plan is identifying your core program values. These are the foundations for how you will collect and implement your evaluation moving forward. Remember that program values do not need to be overly complicated. They are meant to guide you through the evaluation process.

Values-driven evaluation assesses how much a program or project aligns with specified values and principles. Below are some steps and considerations to implement values-driven evaluation effectively:

1. **Define Core Values:**
   - Clearly articulate the core values that your organization or project holds. These should guide decision-making and actions.

2. **Integrate Values into Mission and Goals:**
   - Ensure that your values are integrated into the mission and goals of the program or project. This alignment will serve as a foundation for evaluation.

3. **Engage Partners:**
   - Involve critical partners in the development of values and evaluation criteria to include diverse perspectives and a more comprehensive understanding of the values at play.
   - Regularly monitor and measure the program's performance against the established values. This may involve ongoing data collection and analysis.
   - Regularly reflect on the evaluation process and outcomes. Use this reflection to refine the values-driven evaluation approach for future programs.

By integrating values into the evaluation process and continually refining the approach, organizations can feel confident that their programs align with their stated values and contribute positively to their mission and goals.

Resources for Identifying Values:

One Organization’s Description of Recovery-Oriented Values GO TO LINK

What does the research say?

Aligning the values of recovery services with a recovery model provides a sense of purpose to individuals in recovery. Examples of shared values from the recovery model include self-determination, empowerment or choice, community integration, hope, strengths, self-help, and self-efficacy.

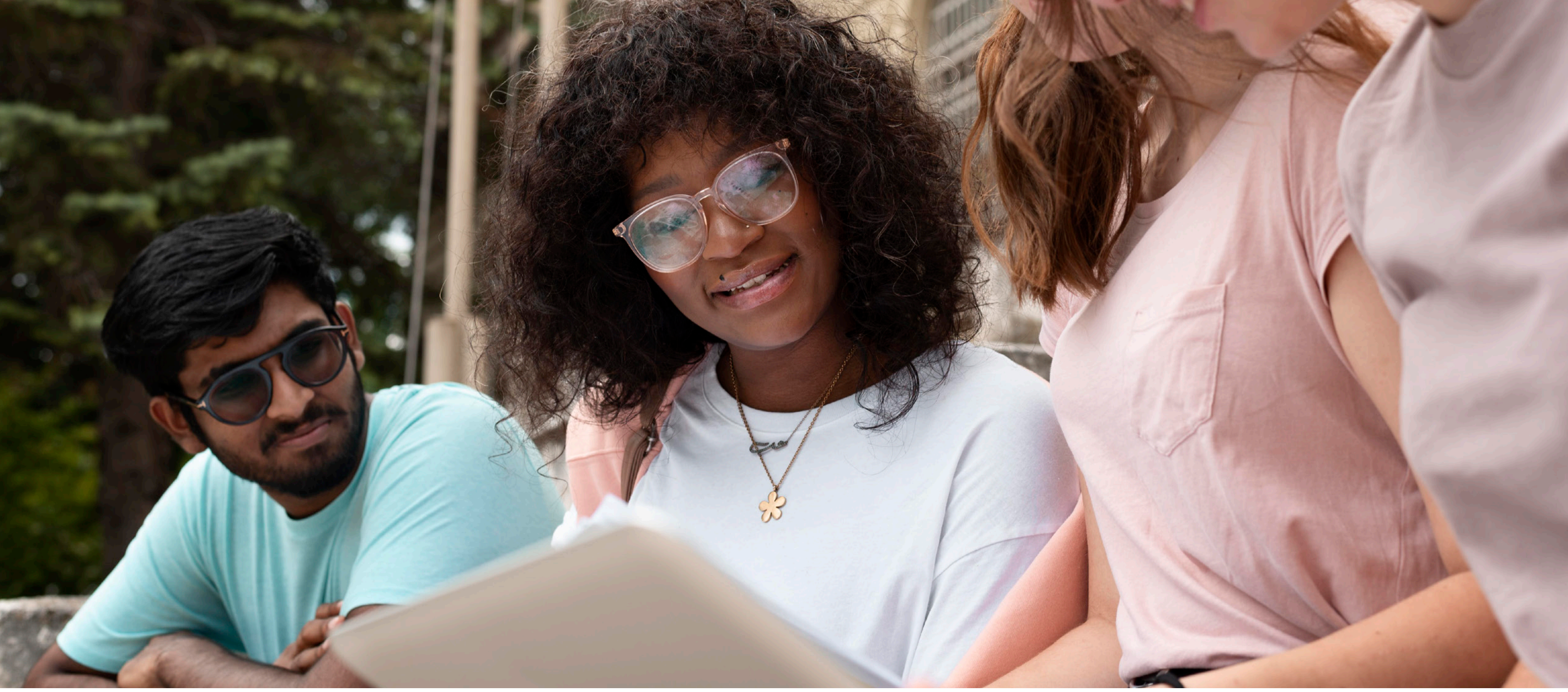
Integrating PRSSs throughout the evaluation process is essential. PRSS involvement throughout the development, implementation, and maintenance of measurement-driven recovery services often results in services designed to promote hope, empowerment, personal responsibility, and social inclusion.

What does it look like in practice?

When exploring program values, take the time and create a safe space to facilitate intentional conversations. Try to include a wide range of voices and experiences (e.g., program staff, community partners, and individuals impacted by your program). Focus on clearly outlining priorities around the information you want to gather from the evaluation and how it will be collected. Once you have identified your core values, communicate them to everyone (including peers) involved throughout the process, from planning to reporting. Getting lost in the evaluation process is easy, but your values should ground you in your work and overarching goals.

The recovery model has seven core values that you can use as a starting point to align with your peer recovery support services:

- **Self-determination**
- **Empowerment of choice**
- **Community integraion**
- **Hope**
- **Strength**
- **Self-help**
- **Self-efficacy**



Now It's Your Turn: Exploring Your Values

Make a plan to discuss your program's core values with important partners. Use the following questions to guide you.

Guiding Questions:

?

Does my organization or program already have established core values?
If yes:

- Do they align with the services currently being provided?
- Do they align with the values of peer recovery support services overall?
- Are there any adjustments that need to be made to the existing values?

?

If the program does not have established values:

- Who is the best person to facilitate intentional conversations around program values?
  - What voices need to be included?

    PRO TIP: Use the worksheet on the next page to brainstorm!
- What recovery models does your program utilize? (e.g., eight dimensions of wellness, SAMHSA's four dimensions of recovery, recovery capital)
  - What values align with those models?

?

How can I share program values with everyone involved?

- What feedback is needed on the values?

Worksheet 1: Brainstorming Values

Use this document to brainstorm core program values. There is space for different groups who may provide input. You can adapt the document based on who you want input from. Examples are provided to give your program guidance.

Program Staff	Community Partners	Individuals Impacted by the Program
What do you want program participants to experience through your services? ***Example:*** *Strengths-based care* *Feelings of hope* *A sense of agency and self-determination* ***Values:*** • *Strength* • *Hope* • *Autonomy* • *Self-determination*	*When you refer someone to the program, what do you hope they will experience?* ***Example:*** *They will feel a sense of community belonging* *They will have equitable access to services* *A feeling of support from their community* ***Values:*** • *Belonging* • *Equity* • *Support*	*From your experience, what should this program value most?* ***Example:*** *Participants must drive their own recovery journey* *Infinite pathways to recovery* *Connectedness and strong relationships* ***Values:*** • *Empowerment* • *Autonomy* • *Connectivity*

A blank version of this worksheet is available in Appendix A ▶

Phase Two:
Choose Relevant Outcomes

Phase Two: Choose Relevant Outcomes

How should I choose program outcomes?

Now that you have solidified your program values, you can use them to identify and track your desired program/service outcomes. Outcomes are the impacts that you want to see as a result of your program or service. It is essential to track the information you need to know to understand whether your outcomes are being met, not just what interests you. Evaluations should strike a balance between being thorough and concise. Tackling too many outcomes can overwhelm your staff and muddy your program goals.

You will know when outcomes are relevant because they will:

1. **Reflect identified values.** These are items that you have already established as necessary, but they can also pique curiosity and even a bit of excitement!

2. **Be measurable.** Choose outcomes that are specific and measurable. For example, if you want to measure "Success," consider what that means. Success can relate to one's quality of life, maintaining relationships, etc. It would be best to choose one of those specific, measurable items rather than the broader term of "success."

Remember, you do not need to reinvent the wheel; use available information to help identify outcomes used by other peer recovery support programs that are consistent with your core values. These outcomes can fall into three categories: short-term, intermediate, and long-term. This means you might want to measure some outcomes right away (e.g., how many individuals you serve through your program), and others may take more time to measure impact (e.g., increased quality of life).

One way to organize your identified outcomes is to create a logic model. A logic model is a planning tool designed to document your goals and outcomes (*see worksheet 2 below*). Not every program needs a logic model, but sharing it with partners and adapting it as the program needs to change can be helpful.

Program Evaluation Resources:

- Getting to Outcomes: Improving Community-Based Substance-use Prevention — GO TO LINK
- NAATP Addiction Treatment: Outcomes Measurement Toolkit — GO TO LINK
- Addiction Treatment Provider Outcomes Measurement Toolkit — GO TO LINK

What does the research say?

Recovery outcomes vary depending on how PRSSs are implemented, types of recovery services, and organizational capacity. Utilizing two peer-specific recovery outcome domains — personal and community skill building — are viewed as guidelines for recovery outcome evaluations and can offer a place to start. For example, individuals learn and grow internal views and practices to support their recovery process through *personal* skill-building domains. Connections between peers and external support, such as other individuals, treatment services, organizations, and communities, are developed through *community* skill-building domains.

Personal Skill Building

- Beliefs and values essential to recovery
- Self-awareness
- Motivation
- Self-management
- Hope

Community Skill Building

- Engagement in services
- Interpersonal relationships
- Perceived community belonging
- Employment

When evaluating a program's success, collecting high-quality and accurate information on a few outcomes is important rather than gathering overwhelming or unsustainable data. It is important to prioritize the outcomes closely related to the nature of the peer recovery support services provided. Additionally, it's essential to establish a consistent process for collecting data on these prioritized outcomes.

What does it look like in practice?

Use your established values as a roadmap for identifying the outcomes you want to measure. Since recovery outcomes can be subjective, ask questions such as: What do you want to learn and measure related to peer personal skill building (e.g., self-awareness, motivation, hope), and what do you want to measure related to a peer's community skill building (e.g., belonging, employment)? You can also start with short-term outcomes and build out to long-term outcomes.

Now It's Your Turn: Identifying Program Outcomes

Use your core values to identify your program's outcomes. The following questions will guide you.

Guiding Questions

? **Have you established your core values?**

? **Have you already established outcomes through program development?**

? **If you do not have pre-existing outcomes, do you want to utilize outcomes previously researched or develop unique ones?**

? **Is your outcome planning going to be used internally or shared publicly?**

- If you share it publicly, you might want to consider tracking them more formally through a logic model.

Worksheet 2: Logic Model

Logic models are tools used to help show the logical relationship between the need/problem you will address, the strategies you will implement, and the changes or desired outcomes you expect to see. There are multiple ways to approach a logic model. This worksheet can be used as a template for working through key outcomes your program would like to track and evaluate. Examples are provided to give your program guidance.

Situation	
Individuals seeking recovery have few resources to maintain recovery efforts in their community.	
Goals	**Intended Population**
Provide effective peer recovery support to adults with problematic substance use.	*Adults seeking recovery services in XYZ Town.*

Inputs *What amount of $, staff, and time have been invested?*	**Outputs** *What types of services are offered? Who participates? How many services are provided?*		**Outcomes** *What will tell us that the program is completing the goal and addressing the situation?*		
Resources	**Services**	**Amount (# of)**	**Short Term**	**Intermediate**	**Long-Term**
• *Partnerships with the community health center* • *Technology resources* • *Space in a community health center* • *Grant funding* • *Three full-time and one part-time PRS*	• *Warmline* • *Peer-led groups* • *Narcan training* • *Individual Peer support* • *Community outreach and events*	• *Warmline calls* • *Peer groups* • *Group attendees* • *Narcan trainings* • *Training attendees* • *Narcan kits distributed* • *Individual interactions* • *Events* • *Event attendees*	• *Increased awareness of problematic substance use and available services* • *Engagement in individual and group support* • *Skills development* • *Reduce immediate harm*	• *Progress towards self-identified recovery goals* • *Improved quality of life* • *Increased community belonging* • *Increased commitment to recovery* • *Sustained engagement*	• *Sustained recovery* • *Established in a recovery-oriented community* • *Reduced stigma through increased awareness*

A blank version of this worksheet is available in Appendix A ▶

Phase Three: Select Evaluation Tools

PEER RECOVERY CENTER OF EXCELLENCE

Phase Three: Select Evaluation Tools

What do I use to measure my outcomes?

Once you know the outcomes you want to measure, the next step is finding the right tool to do the job. Evaluation tools help you measure what you intend to measure. You can collect different types of information, and tools such as surveys should be formatted to make information gathering consistent and efficient.

Program Evaluation Resources:

Measuring Outcomes of Peer Recovery Support Services — GO TO LINK

What does the research say?

Regarding evaluation planning, it is important to identify ways to measure your goals and objectives and how you might collect, analyze, and use this information going forward. Remember, make sure your objectives are measurable and that you are collecting information you will use. One important choice is whether to use an existing tool or create a custom one to measure your outcomes. Some pros and cons of each are listed below.

1. Using Existing Tools

PROS:

- Little time required to develop. May only need or want to add questions related to program engagement, demographics, open-ended questions, etc.
- It is possible to compare with groups outside of your program. Some measures are validated or normed, which can provide cut-offs or categories (mild, severe, etc.)

CONS:

- Questions or outcomes may be more general and may not ask questions exactly as you would like.
- Not able to change without losing benefits like validation.

2. Making a Custom Tool

PROS:

- Best fit with your program's goals and values.
- Can measure tailored outcomes.
- Can administer the tool in a way that is compatible with program logistics.

CONS:

- Require more resources to develop.
- May need consultation from an evaluator.
- Can't compare your program outcomes to other programs or organizations.

Below is a table outlining several existing evaluation tools. Each tool is listed by name, whether it can be used to measure outcomes for mental health, substance use, or both, whether it has a cost, and where to go for more information. Some of the tools identified may not focus solely on recovery but on a broader wellness assessment

Measurement	Substance-Use	Mental Health	Associated Cost?	More Information
Brief Assessment of Recovery Capital (BARC-10)	✔		No	GO TO LINK
ReCAPS	✔		No	GO TO LINK
Recovery Process Inventory (RPI)	✔	✔	Must get consent from the South Carolina Department of Mental Health	GO TO LINK
Recovery Assessment Scale (RAS)	✔	✔	No	GO TO LINK
The Multidimensional Inventory of Recovery Capital (MIRC)	✔	✔	No	GO TO LINK
Recovery Capital Scale	✔		No	GO TO LINK
WHOQOL Quality of Life Assessment	✔	✔	No	GO TO LINK
Strengths And Barriers Recovery Scale (SABRS)	✔	✔	No	GO TO LINK

It is essential not to allow the tool to dictate your values and the outcomes you measure. Instead, identify the best match based on your needs and determine what additional information you can gather to fill in any gaps.[1]

[1] SAMHSA is actively working on a recovery/ quality of life measurement tool that is field-driven, inclusive, evidence-based, and grounded in SAMHSA's definition of recovery. It is a 13-item instrument and is currently in its testing phase with a goal of finalization in the Summer of 2025. Visit here to get connected to SAMHSA's recovery resources: https://www.samhsa.gov/find-help/recovery.

What does it look like in practice?

The following demonstrates how an organization could select an evaluation tool for its program.

Sample Program Overview: The peer recovery support program has decided upon values that align with the Recovery Model, which include self-determination, empowerment or choice, community integration, hope, strengths, self-help, and self-efficacy. This program only has a little time to build its tool, so it wants one already developed and validated (i.e., measures what it is set to measure). They are interested in a tool that is short, easy to implement and requires little training. They have a tight budget and want a tool that will be at no cost to them. Lastly, they anticipate looking at change over time, so they want a tool that can be consistently administered and tracked.

This program has chosen the Brief Assessment of Recovery Capital (BARC-10) because:

1. **Outcomes and Values:** The measure aligns with the recovery model values and outcomes with domains including:
   - Substance Use and Sobriety
   - Global Psychological Health
   - Global Physical Health
   - Civic and Community Engagement
   - Coping and Life Functioning
   - Meaningful Activities
   - Housing Status
   - Risk-Taking Behaviors
   - Recovery Experience
   - Social Support
2. **Feasibility:** Due to its short length and concise wording, it is logistically practical for various settings.
3. **Training:** The BARC-10 requires minimal training and technical assistance requirements.
4. **Associated Costs:** This tool is publicly available at no cost.
5. **Consistency:** The BARC-10 can be administered to peers over time to track recovery capital*.

** Recovery Capital relates to the full spectrum of resources that impact an individual's recovery.*

This program also explored ways the PRSS could use the BARC-10 to support a peer's recovery process. Though the examples below refer to the BARC-10, similar strategies could be used with many different tools.

Engagement & Rapport Building The BARC-10 can be used to connect PRSS and peers during sessions or meetings, build mutual understanding, and develop relationships, especially where barriers exist.	**Examples:** A PRSS used the BARC-10 in an early meeting to engage a new peer and discuss their recovery. The PRSS was able to build rapport by discussing the individual's score in each domain. They noticed that the individual had a lower score on the domain of *deprioritizing substances* and started a conversation to explore why the peer they were working with might not be interested in deprioritizing substance use. This led to a discussion of the peer's difficulty with finding other engaging activities outside of substance use. A PRSS reached out to a peer after they finished treatment and offered the BARC-10 as a tool. The PRSS used the tool as a starting point to talk about different recovery areas and get to know the individual. Discussing the individual's responses led to a conversation about their shared recovery experiences and meaningful activities, building rapport quickly.
Recovery Planning Scores on specific domains can offer insight into areas to focus on and inform recovery goals.	**Examples:** A PRSS used the BARC-10 in an individual meeting and noted the peer's low scores on *life satisfaction and fulfilling activities.* This led to the PRSS and peer agreeing on goals focused on physical self-care and trying new activities. A PRSS included the BARC-10 in a recovery group session. Participants used their individual scores to create their recovery plans. The BARC-10 highlighted areas with lower scores that need more attention while also showing areas of opportunities for planning and support.
Tracking Progress & Growth When completed over time, the BARC-10 can be used to show areas of growth, provide immediate feedback, and encourage individuals in their recovery. Generally, decreasing scores indicate areas needing more support, and increasing scores indicate progress and growth.	**Examples:** A PRSS provider reviewed initial and follow-up BARC-10 scores with a peer, which led to a conversation about the growth the PRSS and peer have seen. The peer responded positively to the strength-based, immediate feedback, noting that it was helpful to see changes from an "outside perspective." A PRSS uses the BARC-10 to support their recovery journey, completing it monthly to see if and how their score changed and where they might need to ask for help from their support network.

Now It's Your Turn: Choosing an Evaluation Tool

Choose the evaluation tool that best fits your program's needs. Use the following questions to guide you.

Guiding Questions:

? **Do you already have a tool to measure your outcomes? If so, does it align with your core values and identified outcomes?**

? **If not, do you want to use a pre-existing tool or create one that uniquely fits your program's needs?**

? **Are there additional costs associated with your tool? Do you have the funding to support a tool that requires a cost?**

? **What is the ideal length of time for tool completion?**

Phase Four:
Develop an Implementation Plan

Phase Four: Develop an Implementation Plan

How do I plan an implementation process?

This next phase is focused on mapping out how you are going to integrate data collection into your program's existing workflow. Logistics can vary widely depending on several factors, including the setting, staff capacity, and services offered. Some key logistical areas to consider are:

Program Participants

- PRSS, participants/individuals working with peers, families, etc.

Administration Method

- Depending on the type of evaluation tool and access to technology, administration might look different for different programs (e.g., paper survey, online survey, in-person, or virtual interviews).

Administration Frequency

- The frequency at which you administer your evaluation tool could vary depending on your team capacity, the types of services you are offering (e.g., harm reduction clinic versus consistent groups), the recommended frequency if it's a validated tool, and what you want to do with that information.
- Some programs might want to capture immediate impacts, while others may want to look at impact over time. For example, the BARC-10 can be administered every 1 to 3 months with re-engaging clients to track long-term recovery capital and program impacts.

Information/Survey Tracking and Storage

- An important consideration for the implementation planning is deciding who will track this information and how.
  - If you are using a survey, identify who is going to enter the data and where that data will be housed (e.g., Electronic Health Records, individual charts, Excel spreadsheet, etc.)
- Having the information in one centralized place will help when you are ready to monitor and analyze your data for reporting. It can also help if you want to track progress over time and need to look back for comparisons.
- If you are collecting sensitive data with any personal identifiers, you will want to ensure you are taking steps to protect and secure that information and all individuals' privacy and confidentiality.

Establishing Information Sharing Agreements or Memorandums of Understanding (MOUs)

- A Memorandum of Understanding (MOU) is a written agreement that outlines the relationship between two or more parties.
- A data sharing agreement is an agreement between two or more parties that outlines the purpose of data sharing, explains what happens to the data at each stage of use, sets standards, and helps all parties involved in sharing to be clear about their roles and responsibilities. This document can stand alone or be a part of an MOU.
- Some examples of when you might need to establish an information-sharing agreement can include:
  - Using data from a database outside of your organization
  - Sharing access to the data you collect with one more organizations
  - Cross-system data collection collaboration
- It is important to identify information-sharing needs early on in the evaluation process, as finalizing these documents can often take time.

Data-Sharing Resources

Data Sharing Agreement: An Example from Colorado	GO TO LINK
Justice Center: The Council of State Governments	GO TO LINK
Memorandum of Understanding Guide and Template	GO TO LINK

Implementation Planning Resources

Selecting Best-fit Programs and Practices: Guidance for Substance Misuse Prevention Practitioners	GO TO LINK
Peer Recovery Support Implementation Guide	GO TO LINK
A Guide for Developing Emergency Department Peer Support Programs	GO TO LINK

What does the research say?

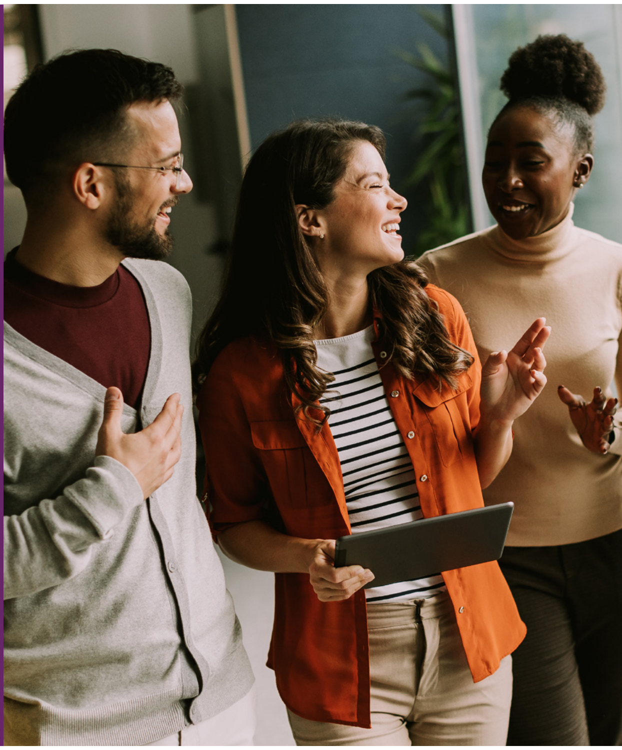
Before making evaluation plans, it's important to identify where you'll be implementing them since logistics can differ for each site. When creating plans, be sure to address the Who, What, When, and Where questions.

WHO?	Who will be responsible for the different steps of the process? (e.g., data collection, evaluation, analyses, reporting, etc.)
WHAT?	What steps need to be considered to implement the process? What materials do you need? What does your documentation look like?
WHEN?	When will this implementation begin, and what is the frequency of data collection? When will it end, if applicable?
WHERE?	Where will this process take place (e.g., one site, multiple sites, etc.) Where will the survey be completed (e.g., a designated space, in groups, in the lobby)

Once the plan is in place, create resources that will support it. For example, you can build a short information sheet that details the instrument, why it is essential to complete it, and how the data will be used.

Tips for Developing Implementation Plans

- Share ownership with those who are directly involved
- Process should be very concrete, clear, and specific
- Build the evaluation into an existing process (e.g., intake) if available
- Stay in ongoing contact with those collecting the data to problem-solve and troubleshoot together
- Incentives for people participating in the evaluation and people collecting the information will help increase engagement



What does it look like in practice?

Here are some examples of logistical planning:

1. **Where the evaluation tool could fit into a program workflow:**
   - During peer intakes and follow-ups, group meetings, or incorporated into paperwork offered during clinic walk-ins.

2. **When to implement:**
   - If you are working at a harm reduction clinic where many people come and go inconsistently, you may want to administer it once per interaction with a peer to identify everyday needs and risks.
   - If you work in a setting where you work with the same peer consistently (drug courts, mental health centers, groups), you can be more intentional with administering the tool monthly, every three months, bi-annually, or annually.

3. **Providing resources to support implementation**
   - Example: A Resource Information Sheet
     - An information sheet can help educate staff and foster buy-in. For example, explain how the tool can be helpful to the PRSS along the way, in addition to using the aggregate data for broader program analysis.

Now It's Your Turn: Building an Implementation Plan

Build out an implementation plan for your measurement tool. Use the following questions to guide you.

Guiding Questions:

? **Are you evaluating one or multiple services and settings?**

- If you are evaluating in multiple settings, think about how you might build on your implementation plan to include plans for:
  - Multiple program structures
  - Varying populations
  - Different measurement administration needs (e.g., paper versus online surveys)

? **What is your capacity for information collection?**

- Accommodate your plans based on your resources (e.g., limited staffing, time constraints)

? **Do you have or need access to technology devices or the internet to collect data?**

? **Do you have a place to house your information/data, and is it secure?**

Worksheet 3: Implementation Plan Template

Walking through these steps will help guide you in your implementation processes. Examples are provided to give your program ideas to start with.

Implementation Steps

1. Evaluation Population – *Who will be part of the evaluation?*
Individuals participating in groups led by a PRSS will complete the survey assessment tool.
2. Administration and Frequency – *How will the evaluation tool be completed?*
PRSSs leading groups will provide survey information to participants. Participants will be allowed to complete the survey independently. *Depending on access to technology, the survey can be completed in multiple ways:* *• Individuals can complete the paper version of the survey independently.* *• Individuals can complete an online version of the survey independently.* *For individuals who visit for re-occurring support/services, administer the survey every three months.*
3. Training Needs – *What education is needed to administer the tool?*
Supervisors will train PRSSs on the survey's background, purpose, administration, and data entry and provide resources and supporting materials.
4. Data Entry – *How will data be handled and shared?*
The administrative assistant is responsible for entering all paper surveys into the online version. The supervisor will download the data from the online survey monthly. *PRSS will receive survey results and ensure that responses are added to the individual's EHR.*
5. Results Reporting – *How will results be shared?*
The supervisor will analyze results and create a slide deck to share critical findings with staff and administration. *This will be completed at least twice annually or as needed.*

A blank version of this worksheet is available in Appendix A ▶

Phase Five: Collecting the Data!

PEER RECOVERY CENTER OF EXCELLENCE

Phase Five: Collecting the Data!

What comes after I start collecting data?

Phase five is focused on collecting data and effective analysis. To have accurate and meaningful results, the data itself must be accurate! Several data monitoring activities should be completed to ensure you are working with high-quality data.

1. **Monitoring your workflow:**
   - Is the workflow you established during your implementation planning working? Do you need to make any adjustments? (e.g., changing the frequency of administration, location, or method)

2. **Checking information for accuracy and consistency:**
   - It is helpful to review your data regularly and check it to ensure it is entered correctly and there are no significant issues (e.g., missing or incomplete information, entry errors, etc.)

3. **Ensuring you can easily find and analyze the information you need for reporting:**
   - Sometimes, programs can easily enter information into systems but have challenges extracting it out to analyze or report easily.
   - This phase of work can be used to test your analysis with real-time data and update or adjust as needed.

Data Collection Consideration Resources

HIPAA	GO TO LINK
Evaluation and Data Collection	GO TO LINK
Substance Use Confidentiality Regulations	GO TO LINK

What does the research say?

It is important to establish an adequate documentation and tracking system so that data is collected and managed correctly. Developing a consistent system to pilot, audit, and track data will ensure the accuracy of the data collected so that programs and organizations can be confident in using the results to make program adjustments and demonstrate the efficacy of peer recovery support programs accurately. Remember that starting small and gradually increasing the scope of the evaluation as you gain confidence in these systems can help you from feeling overwhelmed!

What does it look like in practice?

When you reach the stage where you are actively collecting information, there are several approaches to monitoring workflows.

Checking in with PRSS staff regularly to assess how the process is going. Identify any barriers or challenges and brainstorm solutions.

- This should be an ongoing process as programs and services evolve.

Asking peers about their experiences with the information collection process.

- Sometimes, the best way to judge how a process is going is to ask those impacted directly.
- Examples of feedback they can provide include their comfort with the tool and process, how the tool is administered, the administration setting, and their understanding of why they are being asked to complete the evaluation tool.

Now It's Your Turn: Auditing Data

Audit the data collected from your measurement tool. Use the following questions and Worksheet 4: Data Auditing Checklist to guide you.

Guiding Questions:

? **Is my data complete?**

? **Does my tool collect the information I want it to collect?**

? **Can I easily access and analyze my data for reporting?**

? **Am I using a data storage system that works for me?**

Worksheet 4: Data Auditing Checklist

Data auditing needs can differ depending on the information you collect and how. Below is a checklist of some of the most common considerations when auditing data. The notes column is there to work out potential solutions.

Considerations	Yes	No	Notes
Can you easily track or upload your data for review? (e.g., in an Excel file or spreadsheet)	○	○	
Are your responses complete? (i.e., not missing significant chunks of data)	○	○	
Is your data entered consistently? • Are there any gaps in entry that need to be reviewed?	○	○	
Does your data look accurate? • Look to see if there are any abnormal entries (e.g., N/A's, blanks, or responses that do not align with the questions)	○	○	
Are you able to analyze your data? Analysis examples include: • Adding or summing • Averaging • Counting the frequency of a response • Comparing	○	○	
Are there any "outliers" in your data that might be throwing off your analysis? • It is important to see what is throwing your data off (e.g., typing in an extra digit or other mistakes that are altering results)	○	○	
Can you easily share your data if needed?	○	○	
Are your questions easy to understand? Will your clients be able to read and answer the questions without any difficulty?	○	○	
Do all questions have appropriate response options?	○	○	

A blank version of this worksheet is available in Appendix A ▶

Bonus Call-Out Section: Data Analysis & Storytelling with Your Results

Bonus Call-Out Section:
Data Analysis & Storytelling with Your Results

Data Analysis Basics: How do I analyze my data?

Although it would be ideal for every program to have data support staff to manage data collection and analysis, the reality is that most programs do not have the funding or capacity. Below are some of the most common and basic forms of program data analysis. Remember, you do not have to be a statistician to support your program evaluation. These four basic activities can help tell your program story and support program reporting.

Data Cleaning: Cleaning your data means checking that entries are complete, not missing, and align with what you are measuring.

For Example:

- The question may ask how many days a week an individual attended a group. If you see a response of "10", you know there is an error since there are only 7 days in a week. When you encounter "bad data," you should exclude it from your data set unless you can go obtain clarify the correct response.
- If you don't correct or exclude the data entry, it will throw off your calculations.
  - In this case, it would make your results on the number of days a week individuals attended a group look higher than they are.

Frequencies: Frequencies refer to the number of times something occurs in your data. To calculate a frequency, sum the reported data or take a tally of occurrences.

For Example:

- 150 peers attended an event
- 35 calls were taken on the peer warmline
- 60 group sessions were held each month

Means: To find the mean, or average of a data set, sum the values and then divide by the number of occurrences. Means help to provide a general picture of the data set.

For Example:

- The mean number of warmline calls a PRSS takes in a month can help determine staffing and program capacity.
- The mean scores on an evaluation tool can help identify program needs or resource gaps.
- Click here for a Mean Calculator.

Percentages: **Percentages display a fraction of the whole.** Percentages make it easier to compare groups of unequal size and help readers understand proportions without doing their own calculations

Below are a few scenarios in which percentages can help tell your story.

- **Measuring Goals:** 85% of peers who received program services reported increased life satisfaction.
  - This data can help determine program success or whether a goal is being achieved.
- **Measuring Program Equity:** 25% of participants are Black, in comparison to the census demographics, which indicate that 50% of residents in the area are Black.
  - This data might help programs identify potential disparities or outreach efforts they should make to ensure equitable access to their services.
- **Measuring Change Over Time:** Program satisfaction increased from 60% in quarter 1 to 75% in quarter 2.
  - This data helps to identify changes related to your program over time.
- Click here for a Percentage Calculator.

These analyses can be conducted on basic platforms like Excel, Google Sheets, or Microsoft Forms.

Additional Excel Resources

How to use Excel	GO TO LINK
Microsoft Excel Resources	GO TO LINK
Excel video training	GO TO LINK
Excel Practice Online	GO TO LINK

Data Analysis for Program Evaluation Resources

Statistical methods in Monitoring and Evaluation	GO TO LINK

How do I make meaning of the results?

Different types of data can be collected to help tell the story of your programs. Organize your evaluation process to tell the story with a beginning, middle, and end.

1. **Beginning: Re-examine your situation and goal**
   - What are the goals of your program and the situation you are addressing?

2. **Middle: The Process Data (the outputs of services provided)**
   - What is the program doing?
   - Examples related to process data include:
     - 5 PRSSs completed onboarding training for the program
     - 15 group sessions were held monthly
     - 85% of peers reported being satisfied with the recovery support they received

3. **End: Outcome Data (the impact of services)**
   - What impact is the program having on the situation?
   - Examples can include:
     - 80% of peers reported an increase in quality of life
     - Average scores on the evaluation tool increased from 17 to 20, indicating progress with recovery
     - 12% of peers reported a better sense of belonging in their community
     - 15 peers successfully graduated from the program
     - 95% of individuals engaged in the program reported a decrease in recovery capital from the previous quarter

Now It's Your Turn: Make Meaning of Your Results

Guiding Questions:

? **Are you evaluating one or multiple services and settings?**

- Have you identified the beginning, middle, and end of your program's story?
  - Beginning: The situation you are addressing.
  - Middle: Services the program provides.
  - End: Impacts of your program.

? **Where in the story does each data point fit?**

- **NOTE:** It can be helpful to get very specific here and categorize every outcome or measure you use in your evaluation. (Remember, starting small with fewer outcomes or measures can help this feel less overwhelming!)

Phase Six: Demonstrating Impact and Sustainability Planning

PEER RECOVERY
CENTER OF EXCELLENCE

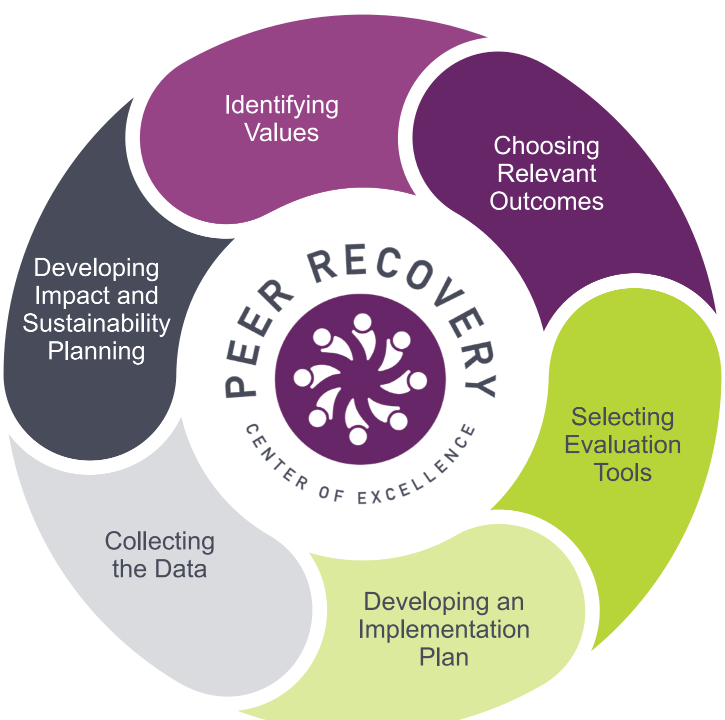
Phase Six: Demonstrating Impact and Sustainability Planning

How do I demonstrate my program's impact and ensure sustainability?

The sixth phase of the values-driven evaluation process is not the last stage but rather a compass to guide your next steps. One of the most critical purposes of an evaluation is to demonstrate the program's impact and help sustain the resources and efforts that support the program.

Remember the graphic that outlines all six phases? Looking at program impact through the evaluation lens can help determine if you need to return to another phase and adjust your process. For example, you may find in phase six that you are not measuring your intended values and need to look for a different evaluation tool. Or, your program is evolving or expanding, and you need to review and update your implementation plan. This process was built for flexibility and adaptation.

In the sixth phase, we will discuss how to address impact and sustainability.



What if the results show that we are not meeting our outcomes?

It is a common fear that evaluation results will not show the progress toward outcomes that we hope or expect. While this is an understandable fear, it is important to remember that the numbers-focused evaluation data is only part of the picture. If your evaluation results aren't what you expect, here are some things to consider:

- What experiential, anecdotal, or qualitative information do you have? Can this help you put the results of your tool into perspective?
- Is your tool measuring what you thought it was measuring? (For example, if someone struggles with depression, could it impact how they answer questions about recovery capital?)
- Should your evaluation process be adjusted? (For example, if participants need more time in the program to reach expected outcomes, should an additional or later data collection point be added?)

Demonstrating Impact

The values-driven evaluation process provides the information and data needed to show that a program is achieving its intended goals and desired outcomes. It is essential to share that information with vested partners, funders, and communities. There are multiple ways to disseminate information, but some common forms include program reports, board presentations, social media posts, conferences presentations, and newsletters.

When sharing program results, there are a few areas to consider that may impact your approach:

Who is your reporting audience?

Examples Include:

- Grant funders
- The public or a specific section of the community
- City boards or council members
- Committee members or advisory councils

What is the goal of your report?

Examples Include:

- Program information sharing
- Public and community education
- Service recommendations
- Grant funding requirements or applications

What is the best format for reporting?

Examples Include:

- A slide deck for presentations
- Report for general dissemination
- A brief one-pager for a specific audience
- Social media posts that highlight key program takeaways
- Service recommendations
- Grant funding requirements or applications

How will you describe the data?

Examples Include:

- Depending on your audience, you may have to avoid program-specific terms or provide more context so your data is properly and responsibly interpreted.
- If you are sharing information with the general public, you should avoid jargon, check the reading level of your writing, and make sure that the information is accessible in a variety of ways (e.g., online, public or private, websites, social media, program staff, etc.)

Sustainability Planning

Two things are consistent across programming: (1) no program or service is perfect, and (2) funding is variable. One way you can address these two challenges is through sustainability planning.

Sustainability planning is reflecting on the results of your evaluation and identifying ways to integrate the lessons learned and resources to improve your program. Sustainability planning reviews the work involved in each phase and asks whether it is working and whether adjustments are needed.

As you reflect on your evaluation results, it can be helpful to include a wide range of perspectives (e.g., peers, PRSSs, administrative staff, program partners). Based on your participants' time and capacity to support your sustainability planning, you can engage in formal planning meetings or informal discussions. The resources below provide guidance for more in-depth sustainability planning.

Sustainability Planning Resources

Rural Health Information Hub	GO TO LINK
Strategies for the Long-Term Sustainability of an Initiative: An Overview	GO TO LINK
Sustainability Toolkit	GO TO LINK
Sustainability Planning Frameworks	GO TO LINK

What does the research say?

Successful implementation of peer recovery support services requires a balance between standardization and variability. To achieve this balance, peer recovery support services should be responsive to the changing and evolving needs of individuals and communities. Sustainability planning helps to identify those successes and challenges and develop actionable plans to expand or increase program impact.

What does it look like in practice?

Sustainability planning can range in levels of engagement and formality. If time and resources are tight, an informal meeting could be scheduled with key partners to review evaluation results and discuss the following questions:

1. **Is the program achieving its intended goals/outcome?**
2. **Is the program adequately staffed and does it have the resources to achieve its outcomes?**
3. **What are program successes?**
4. **What are program challenges?**
5. **What opportunities are there for program growth?**
6. **What changes should we consider making to our program to capitalize on opportunities for growth and address challenges?**
7. **Which phase of the evaluation process will you revisit as a result of the sustainability plan?**

Another way to organize a sustainability plan is through a Strengths, Weaknesses, Opportunities, and Threats (SWOT) practice. A SWOT practice reviews your program's evaluation results and helps identify potential ways to strengthen your program. (See Worksheet 5: SWOT Practice for an example.)

After you have gathered partner feedback, the next step is to summarize the discussion and any priorities or strategies identified into a sustainability plan. This plan can include short-term changes and long-term opportunities and goals.

Now It's Your Turn: Sustainability Planning

As you prepare to create a sustainability plan for your program, consider the following questions.

Guiding Questions:

? **Who should be included in the review and discussion of results?**

? **How will you share the evaluation results? (e.g., slide presentation, reports, etc.)**

? **What format will you use for the discussion? (e.g., SWOT, SOAR, Five Forces Analysis, open discussion, etc.)**

? **How will the sustainability plan be implemented? Who will track next steps and progress?**

Worksheet 5: SWOT Practice

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) practice is an easy way to review your program's implementation and identify various ways to improve your program. Examples are provided.

Strenghts	Weaknesses
What is going well with your programs? What goals and outcomes (from the logic model) are being met?	**What are some challenges you are experiencing with your program? What goals and outcomes still need to be met?**
• *Evaluation data shows that the program is on track to meet all short-term outcomes in the logic model.* • *The program has received positive feedback from the community.* • *The program has strong partnerships with local community organizations.* • *Participants have said that the services align with our core values.* • *The program has increased in size by 3 staff members.*	• *Although the program is growing, we are still experiencing high staff turnover.* • *There is a lack of community awareness of the program in some parts of the county.* • *Most individuals seeking services are not from the primary community we would like to reach.* • *We do not have the program buy-in from some city officials.* • *Current funding will not support the program in the long term.* • *Our evaluation shows that participants are not showing continued increases in recovery capital as we expected.*
Opportunities	**Threats**
What resources exist to help support and build your program? (e.g., partnerships, funding, etc.)	**What are things outside of the program's control that could negatively impact sustainability?**
• *A recent needs assessment suggested that more recovery services are needed in the community.* • *The local hospital association indicated an interest in partnering with the program.* • *There is an RFP announcement about funding recovery-related services that would be a good fit.* • *The recovery field is growing nationally with more research, training, and educational opportunities.* • *There is a training on how to bill Medicaid for recovery services that can help support sustainability.*	• *There is still a strong stigma towards substance use and harm reduction in the community that is negatively impacting service access and engagement.* • *Recent legislation has provided potential barriers for individuals wanting to become PRSSs.* • *Not all partners view PRSSs as professionals or offer the respect they deserve.* • *Statewide funding cuts could impact current funding streams.* • *A lack of standardized measures for Peer Recovery Services make reporting challenging.*

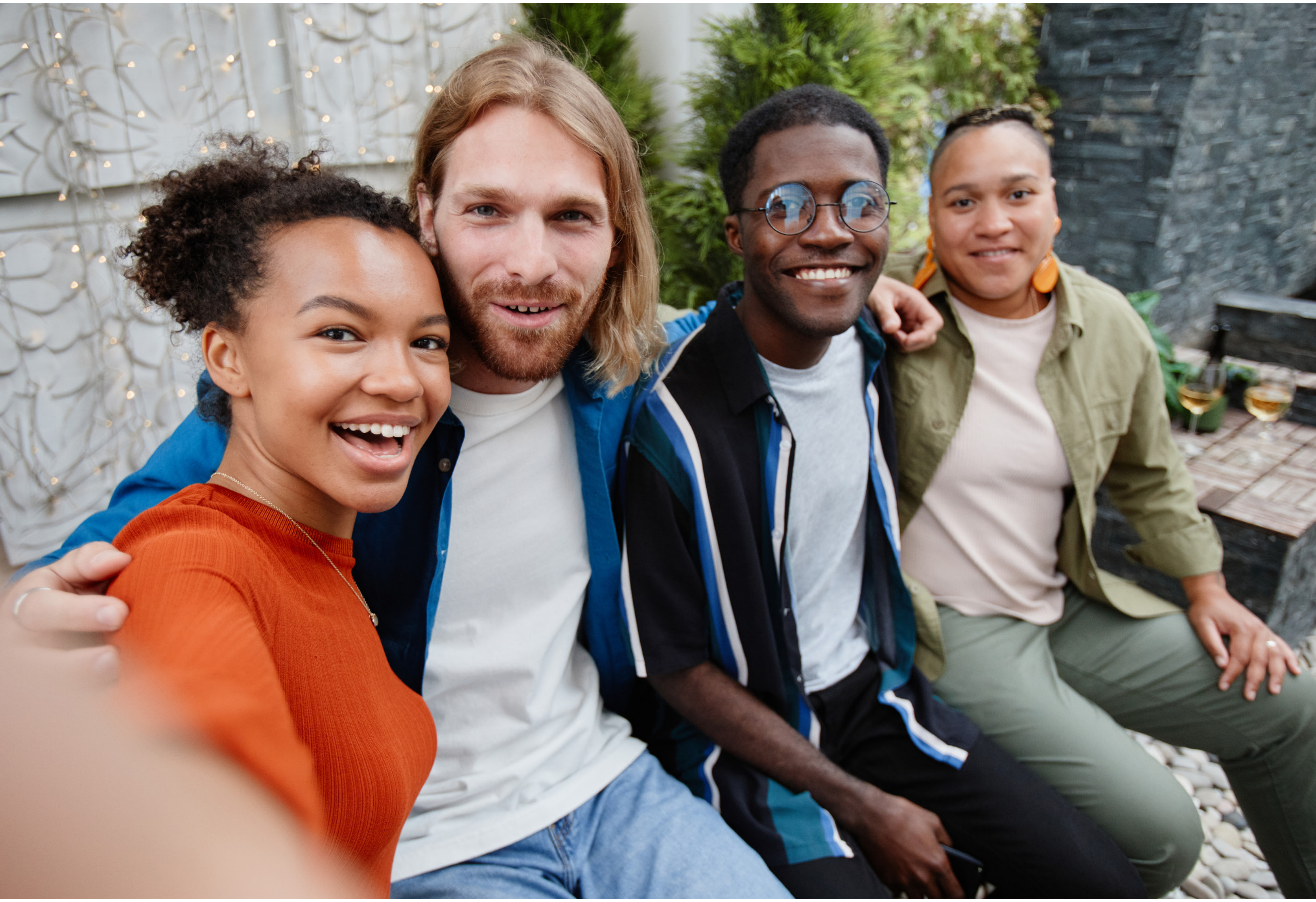
A blank version of this worksheet is available in Appendix A ▶

I Completed the Phases: Now What?

Now that you have done all the hard work of identifying your program's values, outcomes, and evaluation tools, created an implementation plan, collected your data, and created a sustainability plan, are you done?

Evaluation work is never meant to end. Programs are constantly improving, evolving, and overcoming new obstacles. A consistent evaluation process can be used to ensure that your program is on the right track and meeting the needs of your community. Each phase of this toolkit can be revisited and updated based on your program or service needs. This document can also be shared across staff and programs to help educate partners on the process and promote collaboration.

Thank you for your willingness to learn more about your program's strengths and areas for improvement through evaluation! By engaging in this challenging work, you are supporting the individuals you serve as well as the entire Peer Recovery field!



Appendix A: Worksheet Templates

Worksheet 1: Brainstorming Values

Use this document to brainstorm core program values. There is space for different groups who may provide input. You can adapt the document based on who you want input from.

Program Staff	Community Partners	Individuals Impacted by the Program
What do you want program participants to experience through your services?	*When you refer someone to the program, what do you hope they will experience?*	*From your experience, what should this program value most?*

◀ Return to **Phase One: Identify Values**

Worksheet 2: Logic Model

Logic models are tools used to help show the logical relationship between the need/problem you will address, the strategies you will implement, and the changes or desired outcomes you expect to see. There are multiple ways to approach a logic model. This worksheet can be used as a template for working through key outcomes your program would like to track and evaluate.

Situation	
Goals	**Intended Population**

Inputs *What amount of $, staff, and time have been invested?*	**Outputs** *What types of services are offered? Who participates? How many services are provided?*		**Outcomes** *What will tell us that the program is completing the goal and addressing the situation?*		
Resources	**Services**	**Amount (# of)**	**Short Term**	**Intermediate**	**Long-Term**

◀ Return to **Phase Two: Choose Relevant Outcomes**

Worksheet 3: Implementation Plan Template

Walking through these steps will help guide you in your implementation processes.

Implementation Steps

1. Evaluation Population – *Who will be part of the evaluation?*
2. Administration and Frequency – *How will the evaluation tool be completed?*
3. Training Needs – *What education is needed to administer the tool?*
4. Data Entry – *How will data be handled and shared?*
5. Results Reporting – *How will results be shared?*

◀ Return to **Phase Four: Develop an Implementation Plan**

Worksheet 4: Data Auditing Checklist

Data auditing needs can differ depending on the information you collect and how. Below is a checklist of some of the most common considerations when auditing data. The notes column is there to work out potential solutions.

Considerations	Yes	No	Notes
Can you easily track or upload your data for review? (e.g., in an Excel file or spreadsheet)	○	○	
Are your responses complete? (i.e., not missing significant chunks of data)	○	○	
Is your data entered consistently? • Are there any gaps in entry that need to be reviewed?	○	○	
Does your data look accurate? • Look to see if there are any abnormal entries (e.g., N/A's, blanks, or responses that do not align with the questions)	○	○	
Are you able to analyze your data? Analysis examples include: • Adding or summing • Averaging • Counting the frequency of a response • Comparing	○	○	
Are there any "outliers" in your data that might be throwing off your analysis? • It is important to see what is throwing your data off (e.g., typing in an extra digit or other mistakes that are altering results)	○	○	
Can you easily share your data if needed?	○	○	
Are your questions easy to understand? Will your clients be able to read and answer the questions without any difficulty?	○	○	
Do all questions have appropriate response options?	○	○	

◀ Return to **Phase Five: Collecting the Data!**

Worksheet 5: SWOT Practice

A Strengths, Weaknesses, Opportunities, and Threats (SWOT) practice is an easy way to review your program's implementation and identify various ways to improve your program.

Strenghts	Weaknesses
What is going well with your programs? What goals and outcomes (from the logic model) are being met?	**What are some challenges you are experiencing with your program? What goals and outcomes still need to be met?**
Opportunities	**Threats**
What resources exist to help support and build your program? (e.g., partnerships, funding, etc.)	**What are things outside of the program's control that could negatively impact sustainability?**

◀ Return to **Phase Six: Demonstrating Impact and Sustainability Planning**

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