Worksheet: Session 4 Monitoring & Evaluation

PNSAT Reflection + Sustainability Action Planning Prep

Instructions
Use your PNSAT results and today's session to reflect on how well navigation is integrated into your clinical workflows. Complete this soon after the session and revisit it as your thinking evolves.

Reminder
The information from the PNSAT and your worksheets are for your use. The specifics will not be shared widely. We will not include names of centers with results in any presentation, report or paper.

That being said, the results are important to your work. You'll use this worksheet in **Session 6 to build your action plan**. Completing it soon-and revisiting it over time-will make that process much more concrete and actionable.

Part 1: Where Are You Now?

1. Self-Identification
Based on your PNSAT results, where is your program in monitoring and evaluation?

- ☐ **Building** (limited or inconsistent data collection)
- ☐ **Strengthening** (data is collected but not consistently used)
- ☐ **Optimizing** (data is routinely used for improvement and decision-making)

2. What's Working Well? (Strengths)
Identify 2–3 strengths related to monitoring and evaluation.

- Strength 1:
- Strength 2:
- Strength 3 (optional):

3. Where Are the Gaps? (Opportunities)
Identify 2–3 areas that need improvement.

- Gap 1:
- Gap 2:
- Gap 3 (optional):

4. Real-World Example
Describe one example that reflects your current M&E practice.
(e.g., data you collect, a report you generate, a missed opportunity to use data)

Part 2: Digging Deeper (Aligned to PNSAT + EBPP)

A. Metrics & Measures

- What data do you currently collect?

- Are your metrics meaningful and aligned with program goals?
  (Examples: patient volume, barriers addressed, time to treatment, no-show rates)

One improvement idea (EBPP: meaningful metrics):

B. Data Collection Systems

- How is data collected (EHR, spreadsheet, software)?

- Is data collection:
  - ☐ Consistent?
  - ☐ Standardized across staff?

One improvement idea (EBPP: standardized data collection):

C. Data Review & Use

- How often is data reviewed?

- Who reviews it?

- Is it used to inform decisions?

One improvement idea (EBPP: routine data review):

D. Quality Improvement (QI)

- How do you use data to:
  - identify problems?
  - test changes?
- Do you use any structured approach (e.g., PDSA)?

One improvement idea (EBPP: QI processes):

E. Communicating Impact

- How do you share program results with:
  - leadership?
  - funders?
  - care teams?
- What story does your data tell?

One improvement idea (EBPP: communicating value):

Part 3: Connecting to Sustainability

How does monitoring and evaluation support your program's sustainability?

- Where can you clearly demonstrate value?

- Where is your impact unclear or under-communicated?

- What decisions depend on better data?

Part 4: Your First Action Step (Prep for Session 6)

Identify ONE realistic improvement to test in the next 30–60 days:
Action Step:

Which EBPP Practice Does This Align With?

- ☐ Defining meaningful metrics
- ☐ Improving data collection
- ☐ Establishing data review processes
- ☐ Using QI methods (PDSA)
- ☐ Communicating program impact

Why this matters:

What will success look like? (simple + measurable):

Who needs to be involved?

Part 5: Keep It Alive (Between Now and Session 6)

Return to this section over time.

- New insights about your data or metrics:

- Feedback from your team or leadership:

- Barriers you're encountering:

- Adjustments to your action step: