

Shall we dance? The first steps

PEW was conceived and initiated by Charlie Murray, a Senior Project Officer at SACHRU, from 1998. At the time much of her work involved assisting and advising project officers to develop project and evaluation plans, as well as project reports to meet the requirements of funders. The unit was involved in supporting well over 180 projects at that stage, many of which were funded by the state health department's Primary Health Care Initiatives and Advancement Programs and Health Promotion SA. The projects were located in community health services, hospitals and non-government organisations.

From this experience, Charlie learnt of the common frustrations and difficulties faced by project officers in their efforts to successfully undertake their projects and subsequent evaluation. Many project officers were intimidated by evaluation, reporting that they had very limited skills and experience, and found the language and process both difficult to understand and a tedious exercise in abstraction when compared to the dynamics of hands-on working with the project's client base. A common fear was that the evaluation requirements would divert precious time and energy from the doing of the project. It was also felt that that conventional evaluation strategies failed to capture the complexities of their projects, and that this could reduce their chances of getting future grants.

Many project officers inherit projects that have very complicated or unrealistic objectives given the resources provided, and typically have limited time to consult with others in the development of project plans. Common evaluation challenges included difficulties in measuring and attributing project success, data collection, writing reports, involving community members, and given all this, perhaps understandably—leaving evaluation to the last minute.

By the time Charlie had provided assistance on her fifth plan, she was having frustrations of her own and wondering how to revive her rapidly waning enthusiasm for evaluation, while at the same time providing practical and effective support. An image makeover for boring evaluation was also clearly required. Perhaps IT and cartoons could help provide some razzle-dazzle.

It was at this point PEW was conceived. It was hoped that a software tool could help project officers, by systematically taking them through the steps of developing their own project and evaluation plans while providing practical suggestions, based on the experiences of other project officers and SACHRU staff, and drawing on relevant literature.

A successful grant application to Health Promotion SA, led to funding to assist with consultation about content and the development of software, originally for CD-ROM format. However, by the time the funding came through, significant developments had occurred in Web-based technology. At that point it was decided to design PEW to be an interactive and continually evolving

resource that would be available 'free to the world' as part of SACHRU's web page. It was intended that in response to guiding questions, users could enter information to construct their plans, save them, and amend them as required. It sounded so easy!

Taking the lead

Following consultation with project officers, community health workers, and SACHRU staff, Charlie, with help from her colleague Richard Cooke, compiled and refined the content for PEW. This was structured into three main components. First, 'Developing a Case for Your Project', which included guidance about how to demonstrate evidence of need incorporating easy access to succinct key policy information about primary health care, as well as state, national and global health priorities and charters. It also provided information about potential funding sources with hyperlinks. The second component, 'Developing Your Project and Evaluation Plan', took users through setting goals, objectives and strategies, explaining what the terms mean, and using guiding questions to prompt users to clearly define their own. PEW then guided the user through the 'Evaluation Zone', which facilitated the development of appropriate indicators and evaluation methods. A 'Budget Wizard' allowing users to cost various aspects of their project was also included in this section. The final component, 'Developing Your Project Reports', included guidance on preparing for writing (considering the different needs of different audiences) and alternatives to reports, and some tips on writing clearly. The contribution of John Palmer from the Department of Public Health at Flinders University was pivotal here, and he authored a section entitled 'Writing: How to Stuff it up'.

Well-respected South Australian cartoonist George Aldridge was engaged to design some colourful characters to help with the image makeover. At the time web pages were relatively new and the potential for international access led to the decision to produce images that represented Australia. Agreement was therefore reached to use characterisations of the Australian kangaroo and budgie engaged in various activities throughout PEW. See Figure 1.

FIGURE 1: IMAGES REPRESENTING AUSTRALIA WERE USED FOR THE IMAGE MAKEOVER OF PEW



When evaluation asked technology to dance

After a period of struggling with different web page design software, which seemed to compound rather than ease the task, it became clear that some formal training in web page design was needed. Charlie's SACHRU colleague, Maryanne Martin, took on this role and subsequently set about converting a mosaic of post-it stickers and arrows (an improvised site plan that had almost completely filled an allocated office wall at SACHRU) into indexed web pages.

Programmers were selected to work on the interactive aspect of PEW. The choice was pragmatically governed by availability and willingness to engage with a relatively small project (and budget). Interestingly, the relationship of SACHRU to the programmers mirrored that of project workers to evaluation; programmers were a somewhat exotic dance troop whose moves and gestures were steeped in mysterious meanings unintelligible to the uninitiated. In the meantime, PEW was placed on a 'hidden' part of SACHRU's web page in September 2000, minus the interactive web construction component, awaiting the selected programmers to 'do their magic'. This allowed the content of PEW to be evaluated and improved (an ongoing exercise until PEW's final release some time later) and the inserted links to be tested by invited potential users. The Web format was a

protracted but relatively successful dance, but the interactive component was still 'dragging its feet'.

Changing partners

In November 2000, Charlie left SACHRU and a new Senior Project Officer, Paul Aylward, took on the management of PEW. He was keen to get the interactive component underway and through liaison with Charlie identified some content gaps and bugs that needed to be addressed. Working with Maryanne, additions were made to the 'Evaluation Zone', notably, the 'Ethics' section was rewritten after the introduction of the NHMRC National Guidelines and this allowed a discussion of the nature of ethics to also be included. Paul also modified the data collection and reporting sections incorporating guidance and examples in poster design and layout. The need to keep the package intuitively simple to use was paramount; the aim was for users to concentrate their efforts on the content and guidance in relation to their own projects and not to worry about how to use the package itself. To further ensure this, a number of pop-up advice icons (see Figure 4) were incorporated to provide additional tips and to assist novice Web users find their way around PEW. PEW then experienced a delay in development stretching some months while the contracted programmers attempted to make the package more interactive.

FIGURE 2: HOME PAGE OF PLANNING AND EVALUATION WIZARD (PEW) WEBSITE

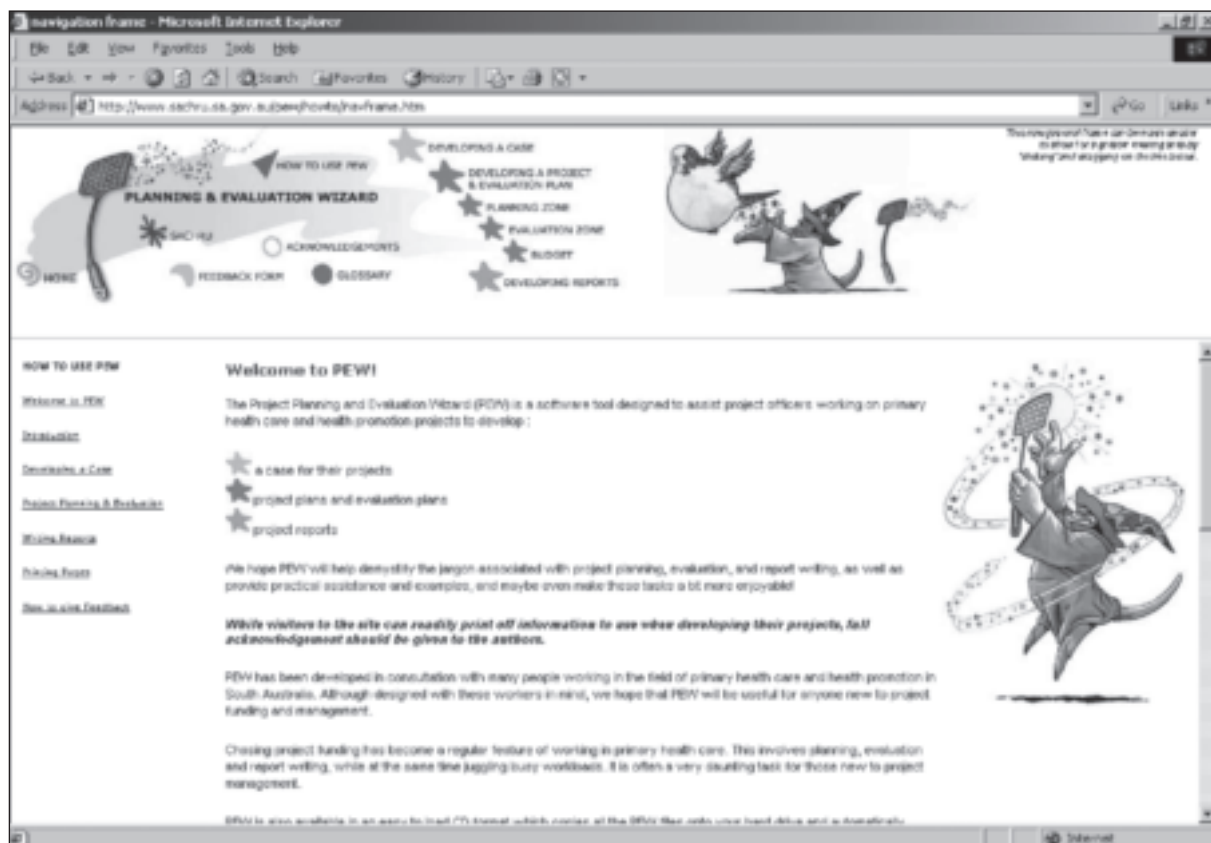


FIGURE 3: EXAMPLE OF INTERACTIVE COMPONENT OF PEW



‘Limbo’ dancing

A number of problems with the contracted programmers caused further delays in PEW’s finalisation. The difficulty stemmed from the programmers’ inability to produce an interactive web page that allowed users to record their evaluation details (aims, objectives, strategies, etc.) in response to specific prompts and questions with the aim to generate each user’s Evaluation Plan for printing. The task was rendered Herculean for the programmers when combined with the need to retain confidentiality and control over the information provided by the user, such that they could return to work on their plan knowing that previously entered information was both retained and secure.

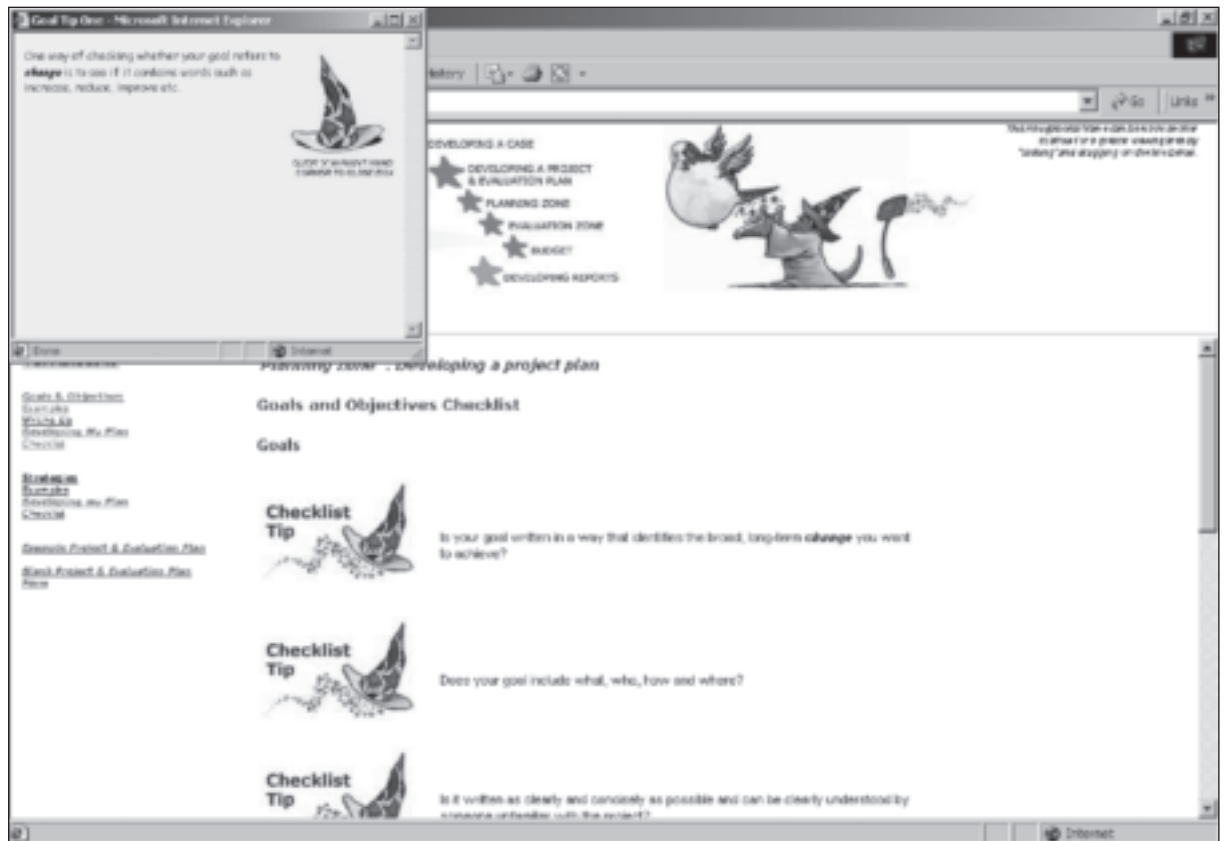
Being led a merry dance

A series of PEW prototypes were provided for Paul to test but each failed to work. In response, and after some months, the contracted company replaced the

original programmer with someone higher in their organisation who, after deciding to adopt different software⁴ for the job, proceeded to produce a second batch of deeply flawed versions of PEW, each with its own set of unique operational problems. While some flaws in the program were detectable almost instantaneously (PEW simply failed to start), others were discernible only when the tester or a recruited SACHRU staff member took time away from other work to systematically move through PEW. Each testing session produced a new list of identified flaws to be ‘ritualistically’ raised in a series of meetings in which the programmer appeared as alarmed and confused as the increasingly exasperated Senior Research Officer.

As the months passed by, congenial relations with the programmer became increasingly difficult to sustain. Strategically, the setting of deadlines, gave way to written complaints, threatened withdrawal of payment, and eventually pitiful pleads for a workable PEW. Time progressed: each prototype had to be tested individually, the faults identified and provided for the programmers to consider, rectify and ultimately re-invent for the next critical cycle. Where the prototype managed to produce an Evaluation Plan incorporating user input, these were both flawed and difficult to understand. It was, however, too late to change programmers, they were already a ‘sunk cost’ and the PEW budget was being

FIGURE 4: POP-UP ADVICE ICONS PROVIDE ADDITIONAL TIPS AND ASSIST NAVIGATION OF SITE



over-subsidised by SACHRU; the investment in PEW was moving beyond what SACHRU's budget could allocate.

The delays allowed Paul and Maryanne to add more pop-ups and modifications. An example Evaluation Plan was included that was accessible to consider from any related zone in PEW, and a linked glossary was added. The concern that the programmers might never 'produce' prompted the inclusion of a blank Evaluation Plan that could be printed and filled in manually by the user.

A number of written explanations for the delays were drafted and periodically sent to the funders. Discussions about the progress of PEW became a cathartic ritual at each SACHRU Management Meeting in which Paul unveiled each new set of programming difficulties. Even when the prototypes of PEW seemed to be working better, they seemed to require a PhD in computer science to operate. However, it was decided to resist the pressure to tailor PEW to the technical preferences of the programmers and keep to the intention of a user-friendly package.

Dancing in the dark

The pressure to finish PEW was growing. Throughout the process, presentations of what PEW 'would be like' (incorporating example html pages) had occurred at a number of conferences

and workshops in tandem with its development. Parts of PEW had been demonstrated at Public Health Short Courses at Flinders University and had been used in the SACHRU Evaluation Training Program for Community Health project workers. The SACHRU periodical *Research Matters* provided regular quarterly updates inevitably focusing on the new additions and teething problems. Inundations of requests for PEW generated by this publicity were replaced by inundations of requests for notification of when PEW would be available. This was proving impossible to estimate with any certainty; what seemed early on to be reasonable timelines, appeared increasingly quixotic, no more accurate than the predictions of an apprentice tea-leaf reader. There was a helpless reliance on the programmers whose ingenuity to create multiple versions of flawed versions of PEW seemed unfettered by notions of time, targets or embarrassment. As stress levels grew within SACHRU, the delays were satirically explained with reference to NASA demanding the programmers' expertise for their latest space mission; PEW would have to wait while they helped avoid a Klingon attack on planet earth. PEW was given in-house nicknames (SPEW, POOH and PHEW) as a coping mechanism. In referring to the PEW budget at a health presentation, Paul mistakenly called it a buzzard. The grinning kangaroo seemed to take on a sinister and mocking persona.

FIGURE 5: 'PLANNING ZONE' OF PEW

OBJECTIVES	STRATEGIES	PROCESS INDICATORS	DATA COLL'N METHODS	IMPACT/OUTCOME INDICATORS	DATA COLL'N METHODS
1. To increase knowledge among the target group about the role of audit and long term care.	<ul style="list-style-type: none"> advertise the program in local newspaper, papers, school newsletters and local radio. Collect resources to form a mobile display, leaflets etc; develop pathologist. Conduct community-based hearing conservation education. 	<ul style="list-style-type: none"> amount and type of advertising material produced and disseminated. Quantit and qualit info source material available. Number of people who visit mobile display; number of resources taken away; referrals. Number of phone calls. Number of people who attend. Referrals for other services. 	<ul style="list-style-type: none"> Count feedback from visitors and health professionals. Count feedback from visitors and health professionals. 	<ul style="list-style-type: none"> People reported to be program will report an increased awareness of the role of audit and long term care. 	<ul style="list-style-type: none"> Some people reported to be program.
2. To increase awareness among people concerned of their hearing levels and the services available to assist those with hearing damage.	<ul style="list-style-type: none"> Conduct information and screening sessions, with assistance from a speech pathologist. Refer people with hearing damage to appropriate services. 	<ul style="list-style-type: none"> Number of sessions, screenings, referrals for other services. Number of referrals to other services. 	<ul style="list-style-type: none"> Count feedback from visitors and health professionals. Count, survey. 	<ul style="list-style-type: none"> People who are screened will be more informed about whether they need a hearing loss, how to prevent further damage and hearing services available to them. 	<ul style="list-style-type: none"> Some people who are screened to part of the program.
3. To increase local business & referrals to services and in using the services of the state and help to reduce the state.	<ul style="list-style-type: none"> Encourage local industrial and retail personnel to provide government services to clients, customers and workers. 	<ul style="list-style-type: none"> Number of local industrial and retail personnel who participate in the program. Level of interaction with the program. 	<ul style="list-style-type: none"> Count, survey. Survey. 	<ul style="list-style-type: none"> Referrals to the industrial, retail business, visitors, attend screening services of the state and help to reduce them. 	<ul style="list-style-type: none"> Some local business, visitors. Document activities.

Breakdancing

That the programmers could or would not deliver was becoming increasingly obvious. The Director of SACHRU made the decision that if, as the programmers asserted, the problem lay in the interactivity of PEW on the Internet we would move PEW to a more reliable CD-ROM format. Inequities in Internet access and optimal performance in rural areas supported the need for a CD version. What appeared to be a workable (if complicated to use) interactive CD was piloted externally, resulting in the user's computer crashing and the loss of files. The transferability of PEW was now an additional issue and debates with the programmer now included the possibility of incorporating specific browsers and downloadable versions of the relevant software. However, it was at this point that it became clear the programmer's expertise in the software was not of a standard that would facilitate our PEW requirements. Given the potential for inflicting damage on the unsuspecting PEW user's computer, it was finally decided to ditch the programmers, ditch the software, revert to the original html format and complete the operational elements of PEW in-house with some further technical assistance provided 'free of charge' from programmers at Flinders Medical Centre.

The last dance

PEW was finalised shortly after this decision was made. The degree of interactivity was reduced but the delays in production had allowed for a more comprehensive content and the html format also allowed PEW to be freely available on the SACHRU website as originally planned. The useability of PEW was further enhanced by this more familiar format; users could concentrate on planning an evaluation without worrying about how to use PEW. The link to a spreadsheet with macros was retained, allowing users to either print the budget template or enter their details directly onto their own spreadsheet, which could be saved directly onto their computer or printed. Pages could be easily printed from PEW, along with examples and linked documents. PEW was tested and retested in-house and by health workers who provided highly positive feedback concerning content and ease of navigation.

The PEW CD was made freely available to all metropolitan Community Health Centres in South Australia with a small fee charged to cover costs for other interested parties. The CD allowed PEW to be copied directly onto the hard-drive of the user's computer (automatically creating a PEW icon on the user's desktop), or for access over a local network. SACHRU decided to encourage users to make multiple copies of PEW to facilitate wider access.

While it is impossible to know the extent of PEW usage without a comprehensive survey, it is pertinent to note that over 300 copies of the PEW CD have been distributed to date. The feedback following PEW's release was very positive with health workers, students and academics all commenting positively about the usefulness of PEW and its benefit to their work. PEW is being used by health practitioners in metropolitan and rural settings and is used on

academic public health courses across all three South Australian universities and in interstate institutions. The Commonwealth Department of Health and Ageing has also recently recommended PEW, with links being incorporated on their website.

The last dance?

So what can be learnt from the processes of designing and producing PEW, of 'dancing with budgies'? Given that learning new dances may be demanding and time-consuming, ensure you allocate adequate time to acquaint yourself with the steps and get yourself into shape with suitable formal training if needed. Using post-it stickers is a beneficial and flexible means to sort out and plan your dance steps. To avoid undue pressure, and retain your mental health, be careful how often and who you talk to about your dancing; expectations of your dancing sharpness from others may put pressure on you to perform in front of them.

Ensure you surround yourself with supportive colleagues. Essentially, choose your dance partners very carefully, particularly if they prefer the more esoteric or exotic varieties of dance and make sure they don't have two left feet! View their dancing from afar before committing yourself to the partnership, and don't let them lead you into a style of dancing that contradicts your motivations for dancing in the first place.

PEW was conceived as an evolving resource, widely accessible and shaped and informed by its users in an ongoing fashion. The authors and coordinators of PEW have all left SACHRU and a new Senior Research Officer has recently taken the helm. We applaud and welcome SACHRU's ongoing commitment to PEW and its further evaluation.

We actively encourage you to visit the SACHRU website <<http://www.sachru.sa.gov.au>> and get acquainted with PEW. Should you wish to provide further feedback on its usefulness and format, an evaluation questionnaire is built into the package for that purpose. PEW's further evaluation and informed modification can only help to enhance its usefulness to those engaged in the planning and evaluation of health projects and programs.

Disclaimer: The views expressed are those of the authors and are not attributable to SACHRU.

Notes

- 1 The authors of the Planning and Evaluation Wizard are: Charlie Murray, Paul Aylward, Richard Cooke and Maryanne Martin.
- 2 <http://www.sachru.sa.gov.au>
- 3 We apologise for contributing to what we consider to be the over-use of metaphor in publication (a Wonderland of 'tapestry', 'journey', 'rainbows' and 'butterflies'). However, the 'dance' expresses so readily the myriad and non-linear processes and experiences we could not resist the impulse to analogise.
- 4 We have opted to omit the names of programming software in order to ensure the reader does not link the process description here with the intrinsic properties of particular products that may or may not have been suitable for the job.