


Data Collection Matrix

York Region Diabetes Education Centre

	<i>Barrington Research Group, Inc.</i>

Client Name			
Data Collection Matrix			
Evaluation Topics	Evaluation Questions	Indicators	Data Sources
PROCESS			
1.0 Admin Supports/ Inputs			
1.1 Staff (RNs, RDs, secretaries, additional health care providers.)	1.1.1 How effectively are the staff resources utilized in the Diabetes Education Clinic?	Human Resources Reports (Vacancy rates, Recruitment Rates, Sick and Over time) Staff satisfaction	Staff survey Human Resources database
1.2 Management support (Program Coordinator, Program Manager, Endocrinologist)	1.2.1 Are clients satisfied with the instruction and attention provided by staff? 1.3.1 How effective are the program management and leadership structures?	Evidence of client satisfaction. Evidence of leadership and management success/lack of success	Client satisfaction survey Focus groups
1.3 Collaboration/ partnerships	1.3.1 What collaborative relationships are in place for the clinic team and stakeholders?	Evidence of collaborative relationships with stakeholders and health care partners	Key stakeholder interviews
1.4 Training activities	1.4.1 What training activities and supports are in place for clinic staff?	Documented evidence of staff training	Human resources database Staff survey

1.5 Educational instruction for patients/families	<p>1.5.1 What are the educational and training resources utilized for clients and their families?</p> <p>1.5.2 Are training activities adequate to meet the needs of patients?</p> <p>1.5.3 What is the client-staff ratio for training?</p> <p>1.5.4 Are families and patients satisfied with the educational instruction provided?</p> <p>1.5.5 What approach to cultural care is in use?</p>	<p>Evidence of use research and evidence based tools</p> <p>Evidence of adequate training activities</p> <p>Evidence of client satisfaction</p> <p>Evidence of culturally appropriate interventions</p>	<p>Chart review</p> <p>Focus groups</p> <p>Staff surveys/interviews</p> <p>Program policies, decision plans</p> <p>Client satisfaction survey</p> <p>Educational resources and tools</p>
1.6 Assessment tools	1.6.1 What types of tools are in use for evaluating client progress and how are they utilized for client care?	Evidence of assessment tools to measure evidence based indicators of diabetes management	<p>Chart review</p> <p>Client education plan reviews</p> <p>Policies, procedures</p> <p>Focus groups/staff survey</p> <p>Client focus groups</p>
1.7 Marketing	1.7.1 What are the marketing strategies in place for the DEC?	<p>Evidence of marketing tools, strategies and approaches</p> <p>Evidence that marketing strategies produced results</p>	<p>Client satisfaction survey</p> <p>Focus groups</p> <p>Clinic marketing evidences (brochures, website, etc.)</p>
1.7 Families/caregivers	1.7.1 Are needs of families/caregivers met through DEC?	Evidence of client and family satisfaction	<p>Documentation review</p> <p>Client satisfaction survey</p> <p>Focus groups</p>
1.8 Volunteers	1.8.1 .How are volunteers utilized in the program to assist with education	Evidence of volunteer involvement in DEC	<p>Volunteer interviews</p> <p>Key stakeholder interviews</p>
1.9 Access/facility	1.9.1 Does the facility meet the needs of the clinic?	Evidence of appropriate space, including meeting rooms, private counselling rooms.	<p>Staff survey</p> <p>Key stakeholder interviews</p> <p>Client satisfaction survey</p>

1.10 Linguists/translators	1.10.1 How does the clinic use translation services for their clients and families? 1.10.2 Do family members feel comfortable with education provided especially if English's is not first language?	Evidence of appropriate translation services for clients and families	Document review Staff survey Staff focus group Client satisfaction surveys
1.11 Communications	1.11.1 Has an appropriate communications plan been developed?	Communication plan available Stakeholder perception on appropriateness of communications plan	Document review Key stakeholder interviews Staff survey
1.12 Funding	1.12.1 How effectively does the clinic utilize all available funding resources?	Evidence of funding resources and budget plan demonstrating adequate use	Document review Budget review Financial records Key stakeholder interviews
1.13 Case management model	1.13.1 Is care provided utilizing a case management model?	Evidence of care provided by case management model approach	Chart review Staff survey/focus groups
2.0 Program Implementation/Plan			
2.1 Intake assessment	2.1.1 Is an intake assessment completed on all clients?	Evidence of standardized evidence-based intake assessment completed for each client. Evidence of blood glucose, HbA1C, lipid panel and blood pressure obtained on initial assessment for all clients.	Chart/documentation review Lab profile review
2.2 Assessment of client/family knowledge	2.2.1 Are clients/families assessed for their knowledge of diabetes?	Evidence that DEC staff have assessed all clients/families for knowledge of diabetes	Chart/documentation review

2.3 Identification of client needs	2.3.1 Are client needs identified?	Evidence that client needs are identified.	Chart/documentation review Client satisfaction surveys
2.4 Creation of education plan and goal setting based on client ability and need	2.4.1 Are client goals and education plans developed based on client ability and need?	Evidence of coordination of educational needs. Evidence that goals and education plan align with client's abilities and needs	Chart/documentation review Staff survey Client satisfaction survey
2.5 Care coordination with other programs and specialists for service delivery	2.5.1 Is care coordinated with other programs and specialists?	Evidence that care is coordinated with other programs and specialists.	Chart/documentation review Clinic referral documentation Staff survey Client satisfaction survey Focus groups
2.6 Provision of educational services and materials based on client needs.	2.6.1 How are the educational services and materials utilized in relation to client needs?	Evidence that educational services and materials are based on client need Evidence of client involvement in care planning	Chart/documentation review Client satisfaction survey Focus groups Staff survey Class schedules Documented learning objectives for each class
2.7 Ongoing case management based on client factors and needs	2.7.1 How is ongoing case management demonstrated as being based on client factors and needs?	Evidence that case management is based on client factors and needs.	Documentation review Focus groups Staff survey Client satisfaction survey
2.8 Support access to care based on cultural requirements of client population	2.8.1 How have the cultural needs of the client population met?	Evidence of educational material available that is culturally sensitive	Documentation review of Client Goal and Education Plans

		appropriate for the client. Evidence of dietary consults with recommendations specific to client's cultural preferences.	Staff survey Client survey
2.9 Monitoring of clinical tests and values	2.9.1 How are clinical tests and values monitored and how are they used in relation to client needs and care?	Evidence of routine clinical tests and monitoring of test results.	Chart review Lab profile review Staff survey Focus groups Client satisfaction survey
2.10 Follow up	2.10.1 How is follow-up care provided for clients?	Evidence of scheduled follow-up of patients by clinic staff.	Staff survey Client satisfaction survey Document review Schedule for routine follow-up; Clinical documentation of follow-up care. Policies/protocols
3.0 Outputs			
3.1 Referrals received	3.1.1 Do the patients referred to the DEC meet the criteria for referral to the program? 3.1.2 Are patients being referred to the program from multiple sources in the community?	All patients referred meet the criteria for referral Evidence of referrals received from multiple sources across the community.	Referral data base Key stakeholder interviews
3.2 Coordination of care	3.2.1 Are the patients seen in the clinic receiving coordinated services based on their needs?	Patients are linked with services specific to their needs	Referral data base Client satisfaction survey

3.3 Education plans developed	3.3.1 Do all clients have a care plan established that outlines their needs?	Evidence of all clients in program have a care plan outlining their care Evidence of client involvement in determining their care plans	Chart/documentation review Client satisfaction survey
3.4 Provision of appropriate education based on client needs	3.4.1 Does the education plan and the education that is delivered meet the specific needs of the client? 3.4.2 Does the education format meet the needs of the client?	The client indicates satisfied or above on the client satisfaction survey The patient indicates satisfied or above on the client satisfaction survey	Client satisfaction survey Chart/documentation review
3.5 Provision of case management based on client needs	3.5.1 Are the clients attending the DEC continuing to receive active case management?	All clients on service receive on-going case management unless discharged from services	Client satisfaction survey Chart/documentation review
3.6 Improved client/family self-care knowledge and lifestyle practices	3.6.1 Has the education provided in the DEC increased client understanding of self-care related to diabetes and increased healthy lifestyle practices?	The client demonstrates change in behaviour related to self-management, diet and exercise practices	Chart/documentation review Focus groups Client satisfaction survey
3.7 Improvement in clinical test values	3..1 Has the education provided at the DEC resulted in a change in client behaviours that has resulted in a positive change in clinical test values?	Reduction in blood pressure, blood glucose level, lipid level	Agency database Lab profile audit/review
3.8 Client/family satisfaction	3.8 How satisfied was the client/family with the education services provided at the DEC?	The client/family indicates satisfied or above on the patient satisfaction survey	Client satisfaction survey
3.9 Ongoing support based on client needs	3.9.1 What continuing on-going support do client receive based on existing or new needs?	Client continues to attend DEC and participate in	Client satisfaction survey

		services as required Services are modified or added when a new need is identified	Focus groups Staff survey Chart/documentation review
OUTCOMES			
4.0 Short-Term Outcomes			
4.1 Client identification of self-care educational needs	4.1.1 Are clients satisfied with educational requirements requested and received?	Evidence of client's educational needs met	Client satisfaction survey Client interviews
4.2 Educational priorities implemented based on client needs	4.2.1 Are educational priorities structured around addressing client's needs?	Evidence of educational needs met.	Satisfaction surveys/client interviews.
4.3 Improvement in initial client clinical test values	4.3.1 Is there improvement in client's laboratory values since instruction started?	Evidence of improved lab results.	Chart/lab results
4.4 Integrated approach to client care	4.4.1 Is there an integrated approach to care with team collaboration of teaching goals and objectives?	Evidence of integrated care provided.	Team surveys/team reports Team satisfaction surveys
4.5 Evidence of improvement in client self-care and lifestyle practices	4.5.1 Is there evidence of improvement in client's self-care, lifestyle and diabetes management?	Evidence of improvement in diabetes management	Client satisfaction survey Client self-reports Lab values
5.0 Intermediate-Term Outcomes			
5.1 Improved client understanding about diabetes	5.1.1 Is client demonstrating increased understanding of diabetes?	Evidence of client understanding and knowledge about chronic condition and complications Evidence of increased quality of life	Client satisfaction survey Client post-skills tests Client skills test scores Client self-reports

5.2 Improved diabetes self-management and control	5.2.1 Do clients demonstrate improved knowledge to control diabetes?	Evidence of client understanding and knowledge about self-monitoring and diabetes control	Client satisfaction survey Client post-skills tests Client skills test scores Client self-reports Chart/documentation review Lab profile review
5.3 Prevention of complications of diabetes among groups with diabetes	5.3.1 Does client understand potential complications of diabetes?	Evidence of client understanding and knowledge about chronic condition and complications	Client satisfaction survey Client post-skills tests Client skills test scores Client self-reports
5.4 Ongoing improvement in client self-care practices	5.4.1 Does client demonstrate improved self-care practices?	Evidence of client understanding and knowledge about self-care practices, lifestyle behaviours and diabetes management	Client satisfaction survey Client post-skills tests Client skills test scores Client self-reports
5.5 Ongoing improvement in clinical test values	5.5.1 Are client lab values improving?	Evidence of improvement in clinical lab test values based on client parameters	Chart/documentation review Lab profile review
5.6 Improved client quality of life	5.6.1 How do clients demonstrate improved quality of life?	Evidence of improvement in client quality of life	Client satisfaction survey Client post-skills tests Client skills test scores Client self-reports
5.7 Prevention of further diabetes complications	5.7.1 How do clients demonstrate understanding what is needed in preventing further complications?	Evidence of client understanding and knowledge of prevention and diabetes management	Client satisfaction survey Client post-skills tests Client skills test scores Client self-reports
5.8 Knowledge sharing of program successes and improvement	5.8.1 Are program goals and successes evident with communication of successes with both key stakeholders and/or external agencies?	Evidence of resource and success sharing with key stakeholders and/or external agencies	Team communication meetings Tool/resource sharing patterns Publications

6.0 Long-Term Outcomes			
6.1 Improved client and family awareness of risk factors related to diabetes	6.1.1 Do clients and families demonstrate awareness and abilities to assess for diabetes related complications? How is this done?	Evidence of client understanding of complications	Client self-reports
6.2 Increased awareness of strategies for managing diabetes	6.2.1 Can clients and families manage diabetes effectively?	Evidence of improved coping and self-care strategies	Client self-reports
6.3 Clients empowered to be self-directed in the management of their care	6.3.1 Do clients feel more empowered in managing their care?	Evidence of improved quality of life	Client satisfaction survey Client self-reports
6.4 Improvement in health care providers' understanding of diabetes control and management based on dissemination of program findings and processes	6.4.1 Is knowledge of DEC program widely accessible to meet needs of culturally diverse populations?	Evidence of dissemination and resource sharing of clinic/program successes and strategies	Documentation of resource sharing Staff awareness of cultural sensitivity in instruction and policies. Staff survey
6.5 Creation and updating of health policies that improve quality of access to culturally diverse populations requiring diabetes care.	6.5.1 Are policies updated and current to reflect cultural diversity in diabetes instruction?	Evidence of current policies and procedure manual reflecting culturally sensitive care	Staff publications and promoting of program to diabetes association Policy/procedure review