

The Importance of Documenting Project Decisions Along the Way

Project continuity is vital to successful outcomes. Ideally, the same program staff and evaluator will guide a project from Scope of Work to Final Evaluation Report, altering details as necessary and keeping a record as they go. But if key players depart, can a project stay on course?

During the 2007-2010 funding period, a number of projects lost vital project staff as county offices eliminated positions, froze hiring, and shuffled remaining workers to different departments.

Particularly when the time rolled around to write Final Evaluation Reports, new project directors sometimes found themselves without sufficient information to describe the project properly.

Yvonne Rodriguez, who runs the Sacramento County Tobacco Education Program, was in this spot. "When we were actually in the process of doing the report, it was quite painful because at least two of the three of us had no history of tobacco," she explained.

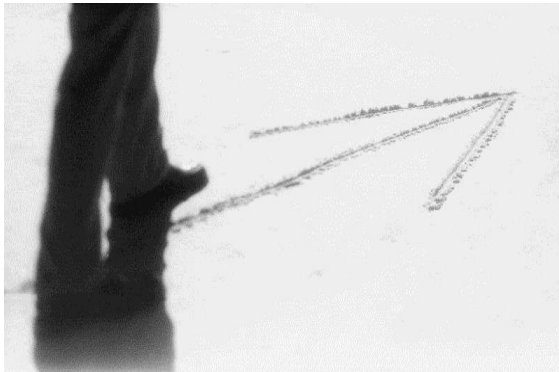


No, I think it was over here...

Between past progress reports and the summaries their former evaluator had prepared, they were able to pull their FER report together, "But there were still some holes; I felt like we were dealing with Swiss cheese," Yvonne said. What was missing was a record of why certain choices were made: "Why we chose that city over another one; why we went to a certain council member over another one to help carry this through."

Document why certain choices were made

Kimberly Bankston-Lee, Project Director of Sacramento Taking Action against Nicotine Dependence (STAND), and her staff faithfully enter project details into the database their evaluation firm has prepared, logging meetings, events, training and technical assistance, advertising, etc., as they take place. But there is no mechanism for recording the reasoning behind pivotal decisions.



Walk this way

"As far as if I were to leave and somebody else had to pick it up? No, that's a huge gap," she said.

Michael Romero presently directs the Placer County Tobacco Prevention Program, among other county programs that include Public Health Emergency Preparedness. Staffing configurations have changed three times during the recent funding cycle, with his tobacco responsibilities competing for time with the H1N1 pandemic.

He noted, "We went through terrible struggles just figuring out what's been done, and then you add evaluation to that, and it just makes it all the more complicated."

There are at least three good reasons why programs should document their decisions as they go along:

1. Staff/evaluator departures. Unless someone (or several people) have kept close track of the design from the original concept to its current form, new and remaining staff and evaluators could be left wandering around clueless about how and why project study designs changed and what to do next.

2. Normal project evolution. Good projects are dynamic, able to respond to new information and influences by changing direction in small and large ways. At the time, it is hard to imagine not being able to remember the chain of events, but when it comes time to write up each project's final evaluation report, busy people can find their memories a bit hazy. "Why did we make this decision again? How did we end up doing that intervention, and what worked best? Who did we include and exclude from the survey sample?"

3. Preserve project history. As circumstances change and new opportunities become available, reliable archives can be mined over and over again for information about what things worked and what didn't. Good records can serve as a portfolio of your own best practices -- and a way to avoid making the same mistakes ever again.



Change happens

Okay, fine, but how should this be done, by whom, and when? Who has the time for more documentation?



Right now, Yvonne is making notes as she goes but she envisions a computer-based protocol that all staff members will discipline themselves to use on a regular basis. Kimberly, who for years has been keeping her own record of things that don't necessarily fit into the database in her trusty steno pad, can see a more formal effort involving prepared sheets which can be used by those who prefer to make notes on paper or logged electronically in an Access database.

Michael just can't see doing more documentation -- "We do it enough!" He prefers oral to written reporting among his team members as a means of "recording" project changes for future reference, but creating this shared understanding of events requires discipline.

Using facilitated discussion techniques, which include repeating and summarizing each other's comments, Michael and his team meet every two to three weeks for this purpose. His philosophy: "You have to commit to a communication system that is effective but not in the way."

Tracking project decisions has undeniable long-range benefits. It can be a good investment of staff time and energy if the work can be streamlined, shared among staff members as a routine chore, and complements a program's operating style and resources.

Pieces of Information to Document	
Intervention:	<ul style="list-style-type: none">■ How you approached populations of interest■ Key contacts in the community■ Who was supportive/opposed and why■ Effective/less effective arguments/strategies■ Methods used to recruit, involve & maintain volunteers
Evaluation:	<ul style="list-style-type: none">■ Rationale for sampling decisions: who included/excluded, size■ How data collectors were trained■ Findings of data collection instrument pilot test■ Any problems that arose during data collection■ Promising strategies for data collection: location, timing, populations of interest, getting people to agree to participate■ How data helped inform the program