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Situational Assessments

OPHS Workshop
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Overview of presentation

- Definition of Situational Assessment: what's in a name?
- The HOW and WHAT of it
- THCU and other resources

Defining situational assessment



A snapshot of the 'present' used to plan for the future.

Situational Assessment

- A situational assessment influences planning in significant ways by examining the legal and political environment, stakeholders, the health needs of the population, the literature and previous evaluations, as well as the overall vision for the project.

Is that different from a needs assessment?



YES IT IS!

- o Like needs assessment, situational assessment focuses on collecting data on community needs.
- o BUT it also considers the broader social, economic, political and environmental context affecting community health needs.
- o Situational assessment also considers strengths, assets and capacities, not just problems or needs.

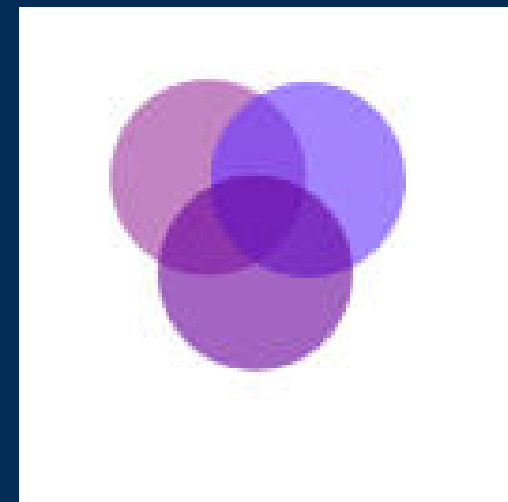
Situational Assessment Glossary



- <http://www.thcu.ca/workplace/sat/glossary.cfm>
- The Health Communication Unit
- At the Centre for Health Promotion

Related Terms

- Situational Analysis
- Environmental Scan



Why conduct a situational assessment?



- To learn more about population of interest (i.e., who's affected by your health issue).
- To anticipate trends and issues that may affect the implementation of your program.
- To identify community wants, needs, assets
- To set priorities

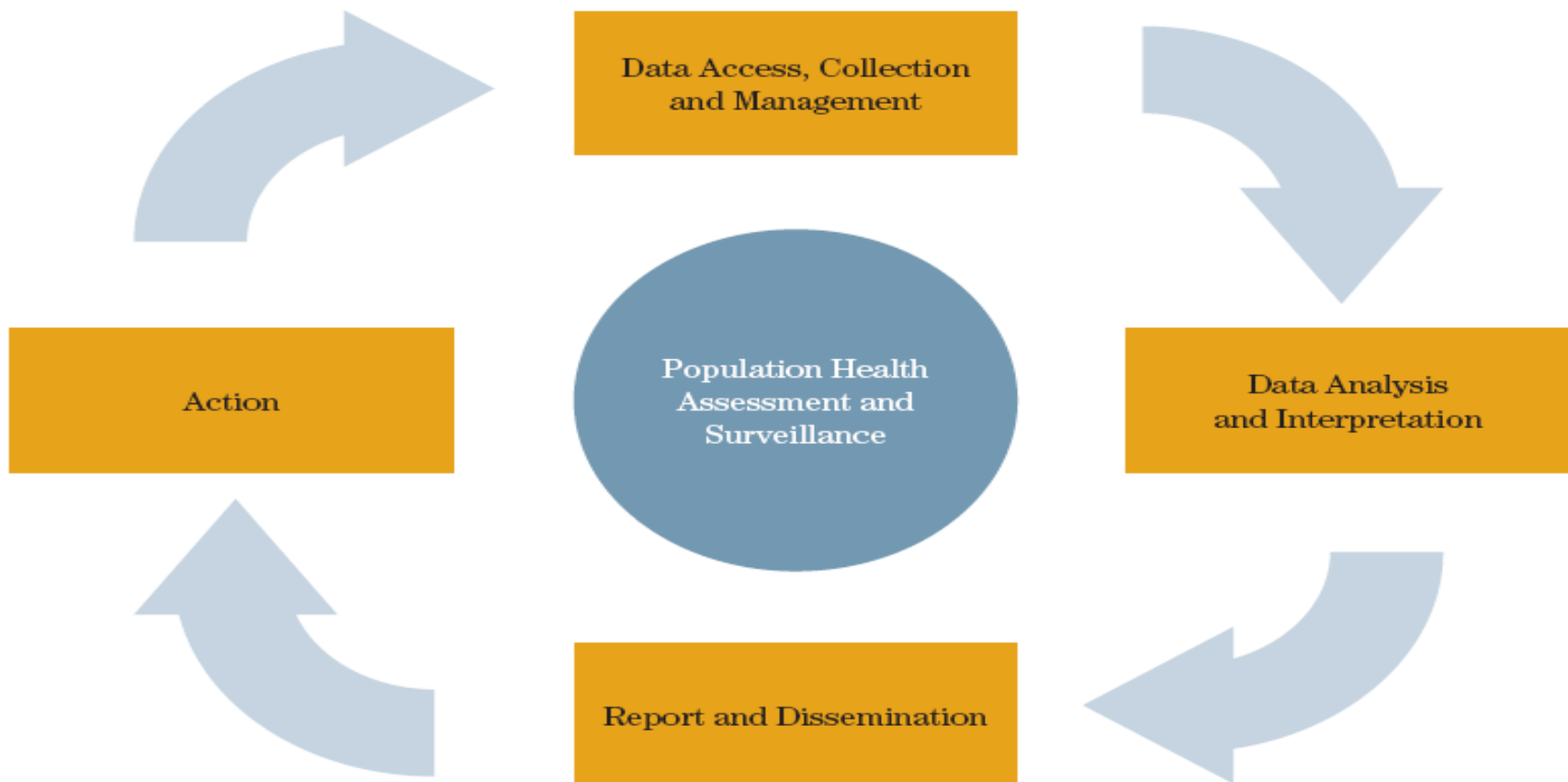
Part of Health Promotion Project Planning

1. Preplanning and Project Management
- 2. Conduct a Situational Assessment**
3. Identify Goals, Populations of Interest and Objectives
4. Identify Strategies, Activities and Resources
5. Develop Indicators
6. Review the Program Plan
7. Implement the Plan
8. Results/Impact

Specific to OPHS

- SA relates to all four principles (Need, Impact, Capacity, Partnership and Collaboration)
- Is explicitly referenced with Population Health Assessment and Surveillance areas of the Foundational Standard (see Protocol)
- Thus is explicitly a part of Requirements within all Program Standards
- Is also closely linked to Research and Knowledge Exchange and Program Evaluation

Figure 1: Population health assessment and surveillance cycle



Data Analysis and Interpretation

- Page 8, PHA & S protocol
- The board of health shall synthesize data and information into a situational assessment as required.

Data Analysis and Interpretation con't

- A situational assessment includes, but is not limited to the use of the following types and sources of information:
 - Key facts, trends, and recommendations from the literature;
 - Data and analyses obtained from population health assessment and surveillance;
 - Legal and political environments;
 - Stakeholder perspectives; and
 - Recommendations based on past experiences, including program evaluation information

The How of it?

- How is a question of type of data, sources, and method

OHPP Website - Homepage



The screenshot shows the homepage of the Online Health Program Planner (OHPP) website. The browser window title is "The Health Communication Unit - Home - Windows Internet Explorer" and the address bar shows "http://www.thcu.ca/". The website header includes the title "Online Health Program Planner" and a navigation menu with links: Home, About Us, Login/My Account, Help, Policies/Privacy, Search, and Contact Us. A sidebar on the left lists the steps of the planning process, with "Step 1 Project Management" selected. A central image shows four people in a meeting. A "Learning Centre" sidebar on the right lists resources like "Tools and Resources" and "Sources of Evidence". The main content area features a heading "The Online Health Program Planner: What's in it for you?" followed by a list of benefits and a section titled "What is included?" which describes the worksheets available for each step.

Online Health Program Planner

National Collaborating Centre for Methods and Tools
Centre de collaboration nationale des méthodes et outils

Home About Us Login/My Account Help Policies/Privacy Search Contact Us

Steps

- Pre-Step: Setting the Context
- Step 1 Project Management**
- Step 2 Situational Assessment
- Step 3 Set Goals, Audiences, and Outcome Objectives
- Step 4 Choose Strategies, Select Programs and Resources, and Develop Process Objectives
- Step 5 Develop Outcome Indicators
- Step 6 Review the Plan

Options

- Save this plan
- Export this plan
- Load a plan
- Create new plan

Learning Centre

- Tools and Resources
- Sources of Evidence
- Tell Me More
- Show Me Examples
- Glossary and Acronyms

The Online Health Program Planner: What's in it for you?

Our goal was to help you plan better and more easily, by providing

- a series of worksheets (for each step in our planning model) with online entry - that can be used in whole or in part
- That provides easy access to evidence
- Supports partnerships and collaboration
- That offer simple and advanced versions
- Forms that require little or no instruction, while providing lots of instruction and examples
- Can be used with or without the use of our online Planning Workbook

What is included?

A series of # worksheets allowing online entry

- you can see them listed on the left hand side of the page
- the basic list covers 6 steps in our Planning Model, with an initial pre-step to set the stage
- you can expand the list as you want to see the various worksheets we developed for each step
- work on one, some, or all steps
- use one, some or all the worksheets for that step. It's up to you.

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Internet | Protected Mode: On 100%

OHPP Website - Step 2: Situational Assessment



The Health Communication Unit - Home - Windows Internet Explorer

http://www.thcu.ca/ Live Search

File Edit View Favorites Tools Help

The Health Communication Unit - Home

Online Health Program Planner

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Steps

- Pre-Step: Setting the Context
- Step 1 Project Management
- Step 2 Situational Assessment
 - 2.1 Data Gathering Plan
 - 2.2 Data Gathering Priorities
 - 2.3 Problem Definition
 - 2.4 Causal Analysis
 - 2.6 Program Possibilities
- Step 3 Set Goals, Audiences, and Outcome Objectives
- Step 4 Choose Strategies, Select Programs and Resources, and Develop Process Objectives
- Step 5 Develop Outcome Indicators
- Step 6 Review the Plan

Situational Assessment

Worksheet 2.1: Data Gathering Plan [Export to MS WORD](#)

Worksheet Purpose:

You can answer this set of questions more than once. Click the **+ Add another row +** button at the bottom!

Research Question

What is the impact of the problem?

Source of data

Community service organizations

Type of data

Community health status indicators

Method

Literature reviews

Task details

Learning Centre

- Tools and Resources
- Sources of Evidence
- Tell Me More
 - What is this Step About?
 - Importance of Step
 - How to do this Step
 - How to Tips
 - Online Sample
- Show Me Examples
- Glossary and Acronyms

Worksheet Help

- Detailed how-to instructions for this worksheet
- Completed sample for this worksheet

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Types of Data

- Quantitative polling/survey data
- Community health status indicators (census data; ward profiles)
- Community stories/testimonial
- Evaluation findings
- Research findings
- Cost-benefit/cost-effectiveness data
- 'Best practices' syntheses and guidelines

Use Qualitative and Quantitative Data

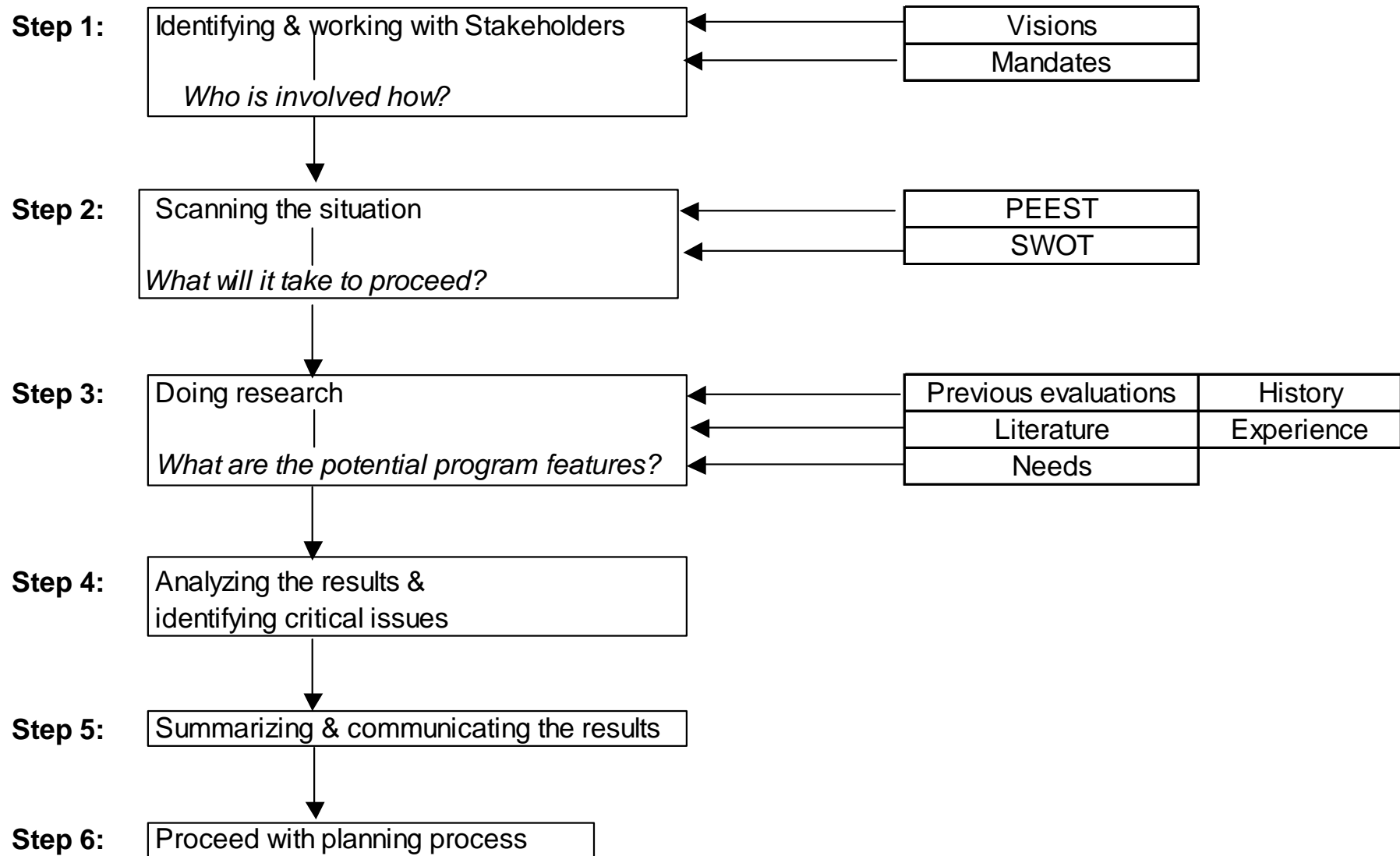
- Talk to people to understand the true "meaning" behind the numbers.
- Numbers may tell you what is happening, but will not tell you why it's happening.

"Not everything that can be counted counts, and not everything that counts can be counted." – Albert Einstein

Techniques, Tools

- Consultation with stakeholders:
 - Using individual consultations.
 - Using focus groups.
 - Through forums.
- Literature review
- Review of past evaluation findings.
- Review of mandates, agendas, policies and/or guidelines of stakeholders.
- PEEST analysis
- SWOT analysis

Steps & Influences in a SA





*You can observe a lot
just by watching.*

Yogi Berra

Sources of Data

- Polling companies (through news reports, website)
- Key community service organizations such as the United Way, Heart and Stroke Foundation (Health status indicators report, websites)
- Community spokespersons
- Journals, magazines, books
- Consultants
- Resource centres such as THCU, other OHPRS centres
- Researchers
- Government departments.
- Private sector (e.g. Large food, athletic companies)



I know exactly what your program needs -
why waste your time on any more investigation?

**If the facts do not agree with the theory,
so much the worse for the facts!**

-Hegel

**Experience is a good teacher,
but the fees are high!**

-Heine

The What of it

- 3 questions:
 - What is the nature of the problem or opportunity?
 - What are the root causes?
 - What can be done?

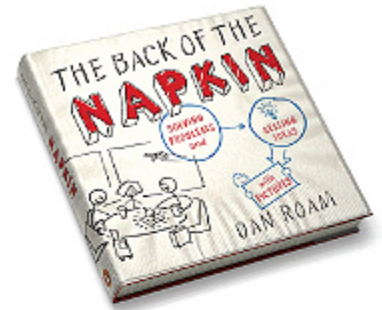
What to do with all the situational assessment info?

- Distill it down to the critical issues that need to be addressed in your plan (problems, causes, solutions).
- Use the data as a baseline for change.
- Use it as the rationale to “make the case” for your plan.

Qualities of a good Situational Assessment

- Comprehensive
- Credible
- Convincing
- Compelling
- Concise
-

		S. simple elaborate	Q. quality quantity	V. vision execution	I. individual comparison	Δ. change as-is
1 who/what? (portrait)						
2 how much? (chart)						
3 where? (map)						
4 when? (timeline)						
5 how? (flowchart)						
6 why? (plot)						



The Visual Thinking Codex

Drawn from:

The Back of the Napkin
Solving Problems and Selling Ideas with Pictures

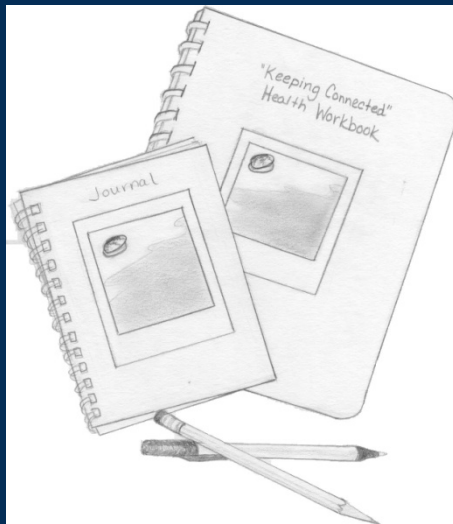
by Dan Roam

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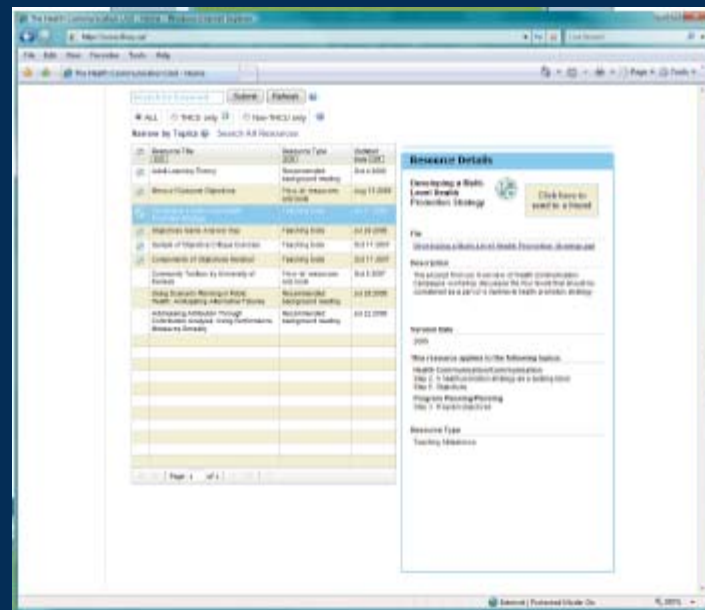
Available everywhere from **Portfolio**

Resources



Database resources on planning

- http://www.thcu.ca/infoandresources/resource_display.cfm



THCU on Planning

- Introduction to Health Promotion Planning Workbook – French and English
- Logic models workbook
- Planning Situations and Solutions
- Create your own planning model
- Planning: At a Glance
- Strategic planning to program planning and back again (webinar proceedings)

http://www.thcu.ca/infoandresources/resource_display.cfm?res_topicID=4

THCU's Consultation Service



- Free to those working on Ontario-focused projects.
- Scope varies, depending on need:
 - o short training sessions;
 - o brief, one-time advice;
 - o review your work or product;
 - o hands-on assistance working through our step models;
 - o links to other sources of information and resources.
- Consultation request form
http://www.thcu.ca/consultation/request_form.htm
- Sample consultations <http://www.thcu.ca/consultation.htm>

Upon Request Workshops

- All of our workshops, are available upon request for groups as small as 30 and as large as 50.
- Any coalition or agency can partner with THCU to host a workshop in their community.
- We provide the facilitators at no cost and will work with you to help tailor, organize and promote the event.
- Service request form
http://www.thcu.ca/consultation/request_form.htm
- We require at least three months' notice to plan and deliver a workshop.

Brought to you by THCU....

- Case Study Series:
 - Planning, evaluation, health communication
- What We're Reading:
 - Recommended and summarized resources
- Literature search results:
 - Completed to support our client consultations
- All available at <http://www.thcu.ca/infoandresources.htm>
- THCU's Online Learning Community:
 - Questions generated from our clients, answers generated by THCU and colleagues <http://www.thcu.ca/blogs/lc/>

THCU in collaboration with OHPRS



- Health Promotion 101

- This free, online course helps people familiarize themselves with essential health promotion concepts.

<http://www.ohprs.ca/hp101/main.htm>

- Online Proposal Writing Course

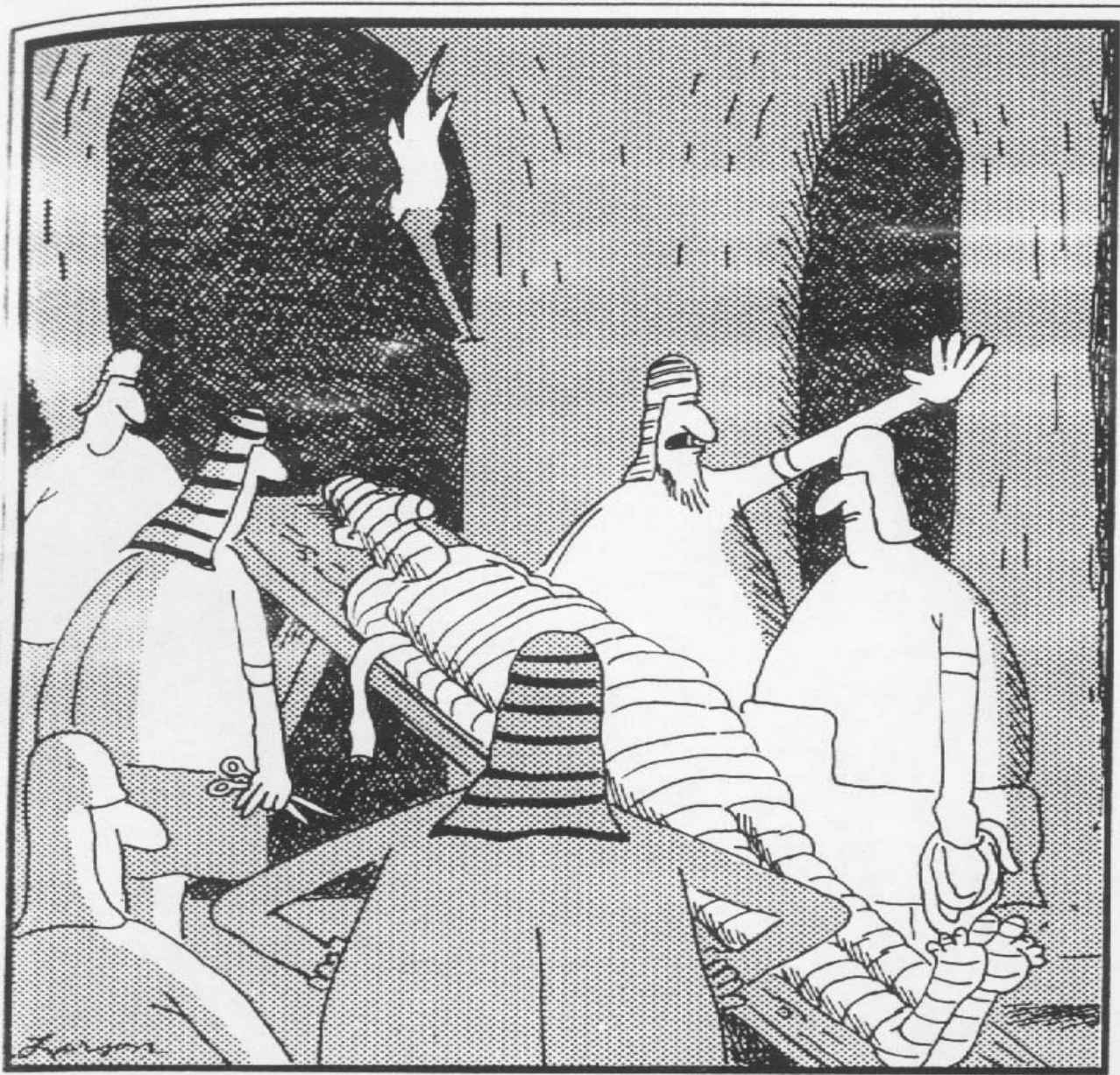
- The purpose of this online course is to help both newbies and veterans prepare a coherent and effective proposal.

<http://www.thcu.ca/ohcc-thcu-proposal-writing-course/>

- Ontario Health Promotion Email Bulletin

- Information exchange among Ontario practitioners.
- Announcements and events distributed weekly.
- Feature articles are distributed every second week.
- The bulletins go out every Friday afternoon.

www.ohpe.ca



“OK, folks!...It’s a wrap!”