# Evaluation Planning Worksheet

### Background/Context

Without getting into too much detail, think about the context for the program or project you want to evaluate.

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| Program Being Evaluated |  |
| Why Is It Being Evaluated Now (high level) |  |
| What Needs to Be Taken into Account? |  |
| Who is the Audience and What are they looking for? |  |

### Stakeholder Analysis

Brainstorm a few stakeholders with a vested interest in the evaluation.

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| Who will be affected by the evaluation’s process or its results? |  |
| Who else might contribute to the success of the evaluation? |  |
| Who is going to use the evaluation? |  |
| Who supports the evaluation? Who opposes it? |  |
| What ethical, cultural, equity considerations need to be taken into account for the evaluation? |  |

### Basic Program Description

The program description forms the basis for the evaluation questions. This table lays out one way of describing a program. Related evaluation questions are provided for illustration.

Write one sentence in the program description column. Hints are provided to guide you.

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|  | **Program Description** | **Related Evaluation Questions (examples)** |
| **Who** | *Who is intended audience? Who else is involved and how?* | *Who are you really serving? How does this compare to what was planned?* |
| **What** | *What will be done? What is expected to change* | *What was actually delivered? How does this compare to what was planned? Evidence of change?* |
| **Where and When** | *Where is program running and what is the scheduling?* | *How do these affect program delivery and participation?* |
| **How** | *How does it work? What is the conceptual approach? What is the model it follows?* | *What does this look like in practice?* |
| **Why** | *Why do we believe this program will be effective?* | *To what extent are we achieving results expect?* |

A logic model is another approach to describe your program.

**Using Logic Model to Describe Your Program**

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| **Logic Model Components** | **Your Program** |
| Inputs: Investments (human resources, materials etc) |  |
| Activities: What will be/was done |  |
| Target groups: Who will be/was reached |  |
| Short term outcomes: Desired changes in knowledge, attitude, behaviour |  |
| Desired Long term impact on condition, circumstance, status |  |

### Evaluation Purpose and Key Evaluation Questions

**Purpose:**

What will you use this evaluation for? *(eg. Identify areas to improve? To see if it meets objectives? To see if it is effective)*

**Key Evaluation Questions:**

From the Program Description in section 3, select the focus of your evaluation and develop 4-6 evaluation questions. Then select 1-2 top evaluation questions that you will focus on. See the handout “Evaluation Questions” for some ideas.

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| **What part of your program do you want to know more about?** | **Evaluation Questions** |
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### Indicators – What Evidence Do You Need to Gather?

For one of your questions, refer back to your program description and identify what indicator(s) you might use to answer that question and where that information might come from.

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| **Key Evaluation Question** | **Indicator** | **Data to Collect** | **Data Source** |
| *What is the question you are focusing on?* | *Indicators specify how the evaluation question will be answered. What do you want to measure?* | *What data do we need collect to answer the evaluation question?* | *Where can we easily get this data?* |
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### Data Collection – How Will You Gather and Analyse the Data Collected

For the data you want to collect, think about how you will gather the data. What steps will you need to take to implement the data collection method you select? How will you analyze it?

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| **Data Collection Method** | **When Will the Data Be Collected and Who Will Do It?** | **Implementation Steps (ensuring it is doable)** | **How Will This Be Analyzed?** |
| *Database, surveys, focus groups, point-in-time data collections, experience based co-design, process mapping* | *Ongoing, at the end of the program? To be collected by program staff? Evaluator?* | *Example: need to develop and pilot a survey instrument or interview questions, create forms for record program data* | *Thematic analysis of qualitative data using Word*  *Descriptive statistics of quantitative data using Excel?* |
|  |  |  |  |

# Evaluation Matrix –

One example of an evaluation matrix, a tool for visualizing and summarizing an evaluation design.

| Evaluation Questions | Indicators | Data to Collect | Data Source | Collection Method | Responsibility for Collection | Analysis Plan |
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