Putting Together an Evaluation Matrix

> An evaluation plan is a written document that describes the "What", the "How", and the "Why It Matters" for your program evaluation project.

But I know what I want to do. Why write it up?

- Written plans are best for ensuring you and your stakeholders are on the same page.

- The process of writing it will help clarify your own thinking and uncover potential barriers and resource needs up front.

- Documenting the thought process and rationale for the evaluation is useful if someone leaves the project, or a new stakeholder joins.

- The plan will serve as a management tool to keep you on track once you start implementing your evaluation.

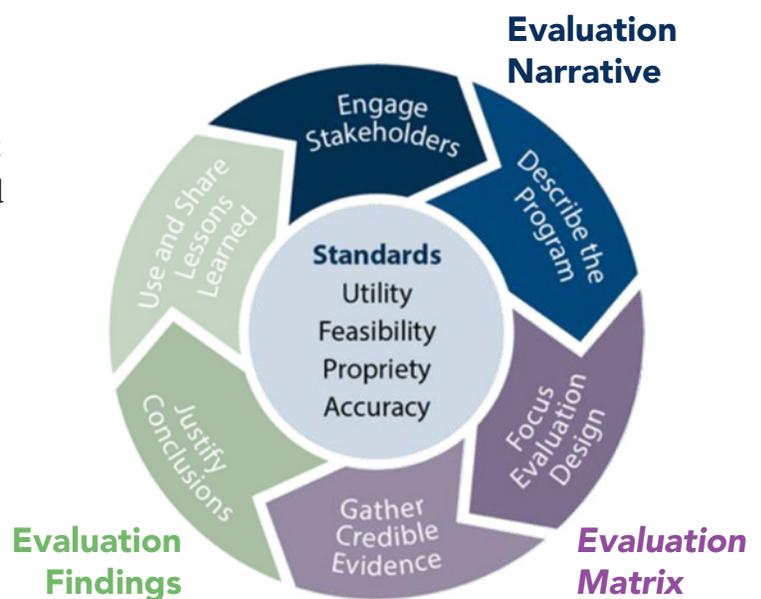- The plan should serve as a jump start for your evaluation report and findings.

Even simple evaluation projects deserve a plan and should simply take less time to develop than for more complex projects.
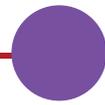
Evaluation Plan Components

An evaluation plan has two main components: (1) a narrative component, which tells you **what** you're going to evaluate and **why it matters**, and (2) and evaluation matrix, which specifies the details of **how** you're going to evaluate it?

In the evaluation framework, your evaluation plan will then feed into your findings and recommendations.

For more information and examples, see Step 4.2 in the Practical Use of Program Evaluation among STD Programs manual.
http://www.cdc.gov/std/program/pupestd.htm

Evaluation Narrative

Engage Stakeholders

Describe the Program

Use and Share Lessons Learned

Standards
Utility
Feasibility
Propriety
Accuracy

Focus Evaluation Design

Justify Conclusions

Gather Credible Evidence

Evaluation Findings

Evaluation Matrix

Questions to ask yourself when putting together an evaluation matrix:

Evaluation Questions	Indicators	Data Source	Collection Methods	Analysis Procedures
• Are these clearly justified in your evaluation narrative? • Are these questions relevant to your key stakeholders? • Do your questions tie to key components of your program logic model? • Can they feasibly be answered based on the available evaluation resources? (time, budget, staff, etc.) • Will an answer to this question help meaningfully guide actionable decision making and program improvements?	• Is the indicator specific, observable, and measurable? • Does each question have an indicator to reflect achievement? (e.g. number of staff trained, percent of health clinics implementing a policy, etc.) • Is there more than one indicator that may help answer a specific question? • Is there baseline data available? • What qualitative aspects of your question aren't necessarily reflected in a particular indicator? (e.g., the nature of a partnership or the process by which a clinic offers screening)	• Where is information on each question and indicator available? (e.g., surveillance systems, program documents, in-person interviews) • Will you be working from existing data, or collecting new data? • Are there multiple questions that you can collect from one data source? • How easy/accessible is the data source?	• For each indicator and source, what specific, detailed steps are you going to take to gather data? (e.g., is a survey via phone or email? From what sample size? Will it be piloted before it's sent to everyone?) • If you're collecting from existing data, what specific elements/fields are going to be collected? At what level? (e.g., line level data, or by provider group, county, or region?) • Do you need an account to collect or store data? (e.g., SurveyMonkey, RedCap) • Do you need to design a new collection instrument or revise an existing tool?	• What data analysis software will you use? (e.g., SAS, SPSS, NVivo, Excel) • How will you clean and prepare your data for analysis? • With quantitative data, what types of descriptive (frequencies, averages, percentages) and inferential (t-tests, ANOVA, regressions) statistics will you be using? • With qualitative data, how will you code the text by themes? • How would you rate the data quality and robustness of your findings? • What outputs (tables, graphs, charts) will you use to communicate your analyses?

An evaluation matrix might also have the data collection time periods and persons responsible, but these are often more usefully displayed in a timeline format, such as a Gantt Chart.

Depending on how novel or complex your data collection and analyses are, your project might benefit from an additional data analysis plan to detail your procedures. While a matrix provides a 100ft view of your evaluation process, the analysis plan provides a 10ft view and can help make sure you're both efficient and effective in your analysis.

Sample evaluation plans can be found in Appendix D of the in the Practical Use of Program Evaluation among STD Programs guidebook (pp 331-354)