# Evaluation Planning Workbook

### 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 are evaluation stakeholders** | **How might they be involved? What will they do?** | **What might they be interested in learning from the evaluation?** | **What do we need to do to get them involved and keep them engaged during the evaluation?** |
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| What ethical, cultural, equity considerations need to be taken into account? |  |

### 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.

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** |
| Rationale: What problem or need is the program addressing? |  |
| Target groups: Who is the program intended to benefit? |  |
| Activities: What will be/was done? |  |
| Outputs: What will result from the activities? |  |
| Short term outcomes: Desired changes in knowledge, attitude, behaviour |  |
| Desired Long-term impact on condition, circumstance, status |  |
| Inputs: Investments (human resources, materials etc) |  |

### 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 Plan – 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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| **Indicator** | **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?** |
| *Number, %, measures of change* | *Database, surveys, focus groups, point-in-time data collections et cetera* | *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* | *Descriptive? Qualitative – review for themes?*  *Comparison to baseline?* |
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# 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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# Thinking Through Data Analysis: A Worksheet

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| Questions to Consider |  | Questions to Consider |  |
| Who will analyze the data and who will coordinate the effort |  | Are your results similar to what you expected? If not, why do you think they are different? |  |
| How will the data be analyzed and displayed? |  | How do your results compare with those of similar programs? |  |
| Against what standards will you compare your interpretations in forming your conclusions? |  | What are the limitations of your data analysis and interpretation process? |  |
| Who will be involved in making interpretations and judgements and what process will be employed? |  | If you used multiple indicators to answer the same evaluation question, did you get similar results? |  |
| How will you deal with conflicting interpretations and judgements? |  | Will others interpret the findings in an appropriate manner? |  |

Source: U.S. Dept. of Health and Human Services Centers for Disease Control and Prevention, 2011. Introduction to Program Evaluation for Public Health Programs: A self-study guide.

# Communication Plan –

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| Audience? | What information need to share? | Why? Purpose for communicating? | How will you share? | When? |
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