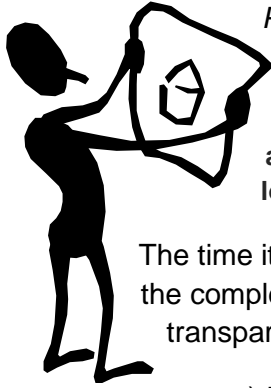


# “How To” Plan a Program Evaluation



*Program Evaluation Planning* allows you to assess the *resources, time and costs* necessary for completing an evaluation project.

It is critical to identify internal resources, time and costs that will be available for a program evaluation. Think about: How much staff time is available? Over how long (1 month, 3 months, etc.) will staff resource(s) be available?

The time it will take to plan an evaluation could vary from a week to months depending on the complexity and rigor of the evaluation. However, the planning process creates transparency and will:

- a) Identify the *purpose* of the program evaluation and *who will benefit* from findings
- b) Aid decision making about *resources, time, and costs*

## **Key questions to answer during the evaluation planning process**

Step 1: What are you evaluating?

Are you evaluating a) program's design/intervention, b) delivery/activities, or c) outcomes/benefits of the program? Without an answer to this question, an evaluation project can be easily sidetracked.

Step 2: Who are your key stakeholders?

Stakeholders should always be people (internal or external) who have a vested interest in the performance of the program. Stakeholders typically include funders or grantors, grant writers, board members, management, program team, community partners, clients, etc. However, depending on the purpose of the evaluation, stakeholders may be few or many. While you don't want to leave anyone out, you don't need to include everyone. Think about the evaluation results and who will benefit from learning about them. For instance, if results are process-oriented, then be sure to include an operations team member.

Step 3: What are your evaluation questions?

Similar to a research project, an evaluation project needs a specific set of questions to answer. This may seem less significant, but this step gives the project direction because it is important to understand what you are looking to learn. Although you can learn something unexpected from an evaluation, having a set of specific and concise questions will direct *how* the evaluation is conducted.

Step 4: What evaluation approach or type of evaluation should be selected for my project?

There are two main types/approaches of evaluation that are commonly used: 1) Formative (focused on inputs into a program model) and 2) Summative (focused on the outcomes of a program). It is helpful to think about the type or form of evaluation most applicable for a project before moving onto the *determination of methods*.

*A method is a procedure or technique* that should be systematic and planned. Methods are necessary for data collection. On the other hand, a methodology is known as the theoretical explanation, principles or strategy underpinning applied methods. (Note: methodology is most important for complex and rigorous evaluations)

# “How To” Plan a Program Evaluation

## Step 5: How should data collection occur for the evaluation project?

Data collection is typically one of the most resource intensive parts of a project. Data collection should be directly influenced by Steps 1-4.

First, outline your data collection process **before** you begin collecting data. Besides selecting how you will collect data (surveys, interviews, annual reports, public use data sets, internal documents, etc.) you will need to establish frequency of data collection, time period, and storage of data.

Data is unique. It has several different characteristics. In order to preserve accuracy and robustness, data should be collected systematically, stored in an appropriate way, especially considering privacy of data, and it should be organized. Private data should be locked or password protected.

The “how, what, who, where, and when” concept applies directly to data collection. Documentation of this concept will save you a headache later.

*How?*-What data collection method did you use? Was data collected by mail, online, or in-person?

*What?*-What did you collect data about? Evaluation questions will provide direction.

*Who?*-Are you collecting data from clients, partners, or other organizations?

*Where?*-Data is unique by geography. Don't assume data collection at one locale is the same as another, based on community type, culture, or physical character.

*When?*-Don't forget this very important information. Collecting data in April may yield different results from December. It is important to time stamp.

## Step 6: What type of data analysis should be conducted for my project?

**Let the data guide you.** If you outline the data collection process like stated above in Step 5 and then think about the characteristics of the data, you will find data analysis to be less complicated.

Common data analysis techniques include the following:

*Trend analysis:* If you have multiple points of data over a time period then you can see a trend. (i.e. data was collected over 6 months). However, you want to air on the side of caution when you have 3 or fewer data points, a trend may or may not be meaningful.

*Basic descriptive statistics of data:* averages, medians, modes, ranges, variances, standard deviations. Descriptive statistics help to summarize data and describe a data set.

*For more detail on data analysis please [contact the Evaluation team](#).*

## Step 7: What is the best way to report findings?

This final step can make or break an evaluation project because if results or key findings are not reported in a way that is clear and concise, then the evaluation can lose steam. The goal of a report is to summarize and deliver key information that will inform decision making and program improvement. The report format, style, and content should be decided upon paying close attention to Steps 2, 3, and 6.