

The Evaluation Planning Template

Courtesy of Delwyn Goodrick

What is it? When is it used?

The Evaluation Planning Template is a tool, designed by Delwyn Goodrick, to guide the development of an evaluation plan. An evaluation plan can be constructed at any point in the project, however, the perhaps the best time is after the program logic map has been created. The program logic map is useful for helping to determine the key evaluation questions.

How is it used?

The template consists of three columns. The first column is a series of headings that guide one through the process of an evaluation plan. The second column poses a number of relevant questions that help the evaluator think about each of the headings in relation to the project. In the third column is a space for the evaluator to respond to the questions in column two and summarise their decisions regarding each heading.

Evaluation Planning Template (D. Goodrick)

Section to be included/ Key Headings	Questions to help you in Planning	Summary Points
<p>The Policy/program or project to be evaluated</p>	<ul style="list-style-type: none"> • What is the policy, program or project that is being evaluated? (that is, what is the evaluand?), What is it trying to achieve?) <p><u>Notes:</u></p> <ol style="list-style-type: none"> a. Program theory and program logic maps may be useful b. Check the commissioning client is seeking an evaluation and not a marketing report! 	

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<p>Purpose of the Evaluation</p>	<p>What is the purpose of the evaluation? Why is it being conducted?</p> <p>Notes:</p> <p>It is often useful to identify the rationale for the evaluation. Why this? Why now?</p>	
<p>Intended Audience</p>	<p>Who is the intended user of the Evaluation report? Who will make decisions on the basis of the findings?</p> <p>How will you support the use and influence of the evaluation?</p> <p>Notes:</p> <ul style="list-style-type: none"> a. Plan for use and continue reinforcing principles of use throughout the evaluation process b. Be clear that the evaluation design/approach addresses information needs of key users 	

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<p>Stakeholders</p>	<p>Who are the other important stakeholders that should be involved in the evaluation? How will they be involved?</p> <p>Notes:</p> <p>a. It is useful to distinguish key audience(s) from broader group of stakeholders). The evaluation is designed to help inform decision making by key audiences.</p>	

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<p>Key Evaluation Questions (KEQ)</p> <p>(3-5 KEQ) and sub-questions</p>	<p>What are the key evaluation questions? What do members of the intended audience of the evaluation want to know? (e.g., about processes of implementation (fidelity, reach, satisfaction) and/or outcomes (effectiveness, efficiency, sustainability, equity, relevance/appropriateness).</p>	

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Focus of the Evaluation	<p>What elements of the evaluand will be studied? and, over what time period?</p> <p>Design, implementation/processes, outcomes etc?</p>	
Scope of the Evaluation	<p>What resources are available for the evaluation? What is inside and outside of scope given available resources? (people/budget/timeframe)</p> <p>a. Given resources and scope, revise KEQ or suggest a phased evaluation approach</p>	

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<p>Design Framework</p>	<p>What design framework is most appropriate? What is the rationale for the design framework to address the KEQ?</p> <p>Notes:</p> <p>a. There are a range of choices here. Experimental, quasi experimental designs, non-experimental (e.g., survey designs, Case studies, Mixed Methods¹) are options that may be appropriate. Identify what is regarded as credible evidence by the client and use this approach if it is feasible. Or, educate client about the value of other design frameworks that they may be less familiar with.</p>	

¹ While most evaluation will incorporate qual and quant methods, the design framework adopted is not necessarily 'mixed methods'
Source: Delwyn Goodrick

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<p>Conduct an Analysis</p>	<p>Who will be involved in gathering/analysing data? Single evaluator/team/combination?</p> <p>Given your evaluation questions, What methods will be most appropriate to answer KEQ? If mixed methods is the evidence from qual and quant to be weighted equally or will one be dominant? How will differences in findings be managed? How will findings be integrated in the study? (KEQ/data/source/timeline matrix may be useful here) Note: Acknowledge likely data issues here in terms of access, availability and credibility</p> <p>6. a. If primary data collection: How will the evaluator(s) gain access? What are the likely ethical issues?</p> <p>6. b. If secondary data analysis: How will you gain access to the data? Ethical issues in using/reporting</p>	

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	<p>How will you link evidence to claims? What type of inferences will be most appropriate?</p>	
<p>Reporting Requirements</p>	<p>What are the reporting requirements of the key audience?</p> <p>How often will reports be presented? To whom? What is the nature of the reports and feedback required?</p> <p>Given the data collected, what are the most appropriate ways to represent the data in the report?</p>	

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Quality Criteria	What quality criteria will be used to assess the quality of your evaluation? What criteria will be adopted to review the procedures and report?	
Ethical Issues	Are there any specific ethical issues that will need to be considered? How will you manage issues of confidentiality in reporting the cases?	
Timelines	What the key timeframes for the evaluation? (these should, where possible, align with decision making timeframes)	
Other	Other issues as negotiated with the client/Evaluation Commissioner	