



EVALUATION PLANNING WORKSHEET

Use this worksheet to begin to map out an evaluation strategy. Start by thinking about the purpose of your evaluation, and about the stakeholders in your program. Then think about the questions you have about your program, and about how you can orient evaluation activities around answering these questions.

PROGRAM DESCRIPTION:

[Enter program or initiative description here. This should be a brief statement summarizing strategies and connecting them to your organization's goals/vision]

PURPOSE(S) AND AUDIENCE(S):

[Who are your evaluation stakeholders? These might be the same as your program stakeholders, or they might differ somewhat. Fill in the chart below, and think about whether there is a particular group you would like to focus on.]

Stakeholder Group	What is this group's interest in your program's success?	How does this group influence your program's success?



EVALUATION QUESTIONS:

[What are the questions you have about your program? Brainstorm a list of questions. For each question, think about the potential benefits and risks of answering that question. Are there particular benefits and risks for the stakeholder group(s) you identified on the previous page?]

While you are formulating questions, remember that the best questions are:

- They are complex enough that you cannot answer them on your own
- They are phrased in an open-ended way
- They have more than one possible answer
- They involve aspects of your program about which data can be gathered
- They relate to program activities that can be changed

PRIORITIZING EVALUATION QUESTIONS

[What are the most important questions to you right now? How about your stakeholders? Think about how answering these questions could lead to actions or adjustments. *Circle* the highest priority question(s) above.]



QUESTION TO OUTCOME TO INDICATOR

[Taking one of your high-priority questions from the previous page, think about an outcome statement that is related to that question. Write down an outcome statement below; then brainstorm some indicators that might represent that outcome.]

QUESTION:

OUTCOME STATEMENT:

INDICATORS:

-
-
-
-
-
-

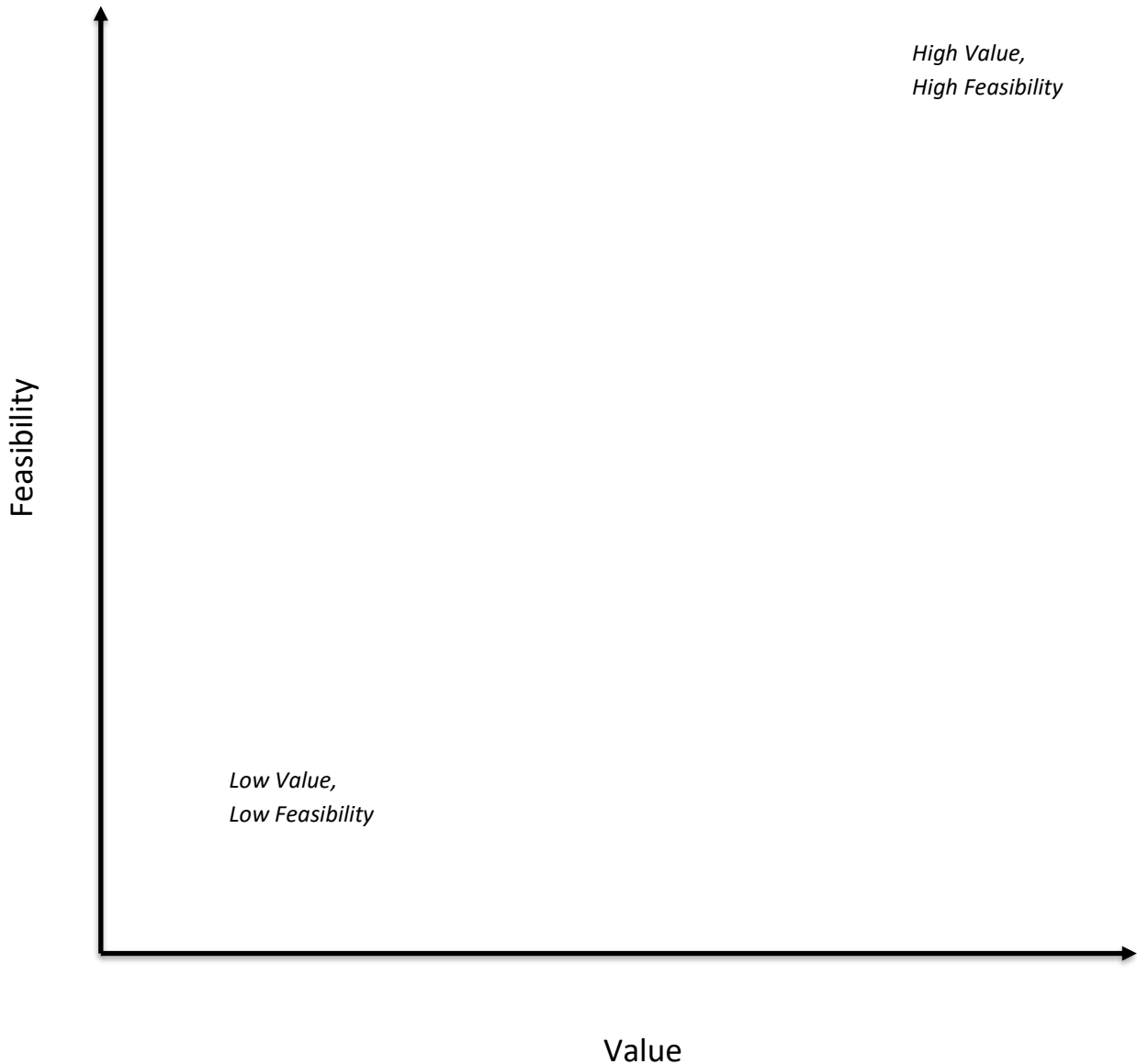
Remember, the best indicators have some or all of the following characteristics. They are:

- **Relevant** to your evaluation question(s)
- **Related** to your work
- **Meaningful** to your stakeholders
- Represented by information that is **reliable** and **accessible**
- *They do not need to be quantitative*



PRIORITIZING INDICATORS

[Generally, it is neither possible nor desirable to collect data on everything you might be curious about. Use the matrix below to start thinking about prioritizing. The X (horizontal) axis represents the value of the information provided by an indicator; the Y (vertical) axis represents the feasibility of collecting information on the indicator. Place your indicators on the graph according to how valuable and how feasible they are.]





MAPPING INDICATOR WORKFLOWS

[After identifying a question you would like to answer and an indicator that can help answer it, you may want to document the way you will collect data on that indicator. The grid below provides one way of thinking about this.]

Evaluation Question:	[what question does this indicator address?]	
Indicator Name:	[what is the name of your indicator?]	
Indicator Description:	[brief description of your indicator]	
Data Source:	collection method:	[by what method will data be collected?]
	frequency:	[how frequently will data be collected or compiled?]
	scope:	[are there any specific inclusions or exclusions from your indicator?]
Presentation:	comparison type:	[between groups, trend over time, pre-/post-, etc.]
	presentation method:	[how will you present this indicator, and to whom?]
	frequency:	[how often will you present this indicator? May or may not be the same as the frequency of collection]
Response:	[how will you respond to changes in this indicator?]	
Notes:	[anything else important to document about this indicator, including its relationship to other indicators]	



[Data collection can be time consuming. Often there are a series of steps involved in collecting data, especially when you are doing so in a way that is inclusive of program stakeholders. Think about the steps involved in data collection, and then place these steps onto a timeline.]

INDICATOR:

KEY STEPS:

- 1.
- 2.
- 3.
- 4.
- 5.

TIMELINE:

Program Activities									
Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June
Evaluation Activities									