CLEARINGHOUSE FOR MILITARY FAMILY READINESS

Evaluation Planning Worksheet

The following worksheet is designed to assist you in the planning process for conducting an evaluation. The information in this worksheet can be used to help you prepare for an evaluation and generate dialogue among members of your evaluation team as you formulate your evaluation plan.

PHASE 1: Prepare for an Evaluation

Please describe below why you are doing the evaluation (e.g., determine if the program we are currently implementing is working with our target population)?

The first step in the evaluation process is to form an evaluation team. Consider who will oversee the management of the evaluation.

1. List the key participants. Include their designated roles within the evaluation process. Consider whether you will use external members (e.g., outside agency, consultant), internal team members, or both to conduct the evaluation.

Evaluation Team Members	Role/Responsibility	Internal or External
Examples: *Jill S.* *John D.* *Tim M.* *Jennifer S.*	*Examples:* • *Leading/managing the evaluation team* • *Identify measures or data collection strategies* • *Communicate progress and updates with stakeholders* • *Develop a data collection plan, including protocols and procedures* • *Track evaluation progress against schedules and the evaluation plan* • *Present evaluation findings to various audiences*	*Examples:* *Internal* *External* *Internal* *Internal*

Evaluation Team Members	Role/Responsibility	Internal or External

2. Please list any stakeholders who should be involved and record their potential roles in the evaluation process. Stakeholders are people or groups who are invested in the program and are less involved in the evaluation process than evaluation team members.

Stakeholder Name/Group	Role in the Evaluation Process
Examples: • *Staff* • *Partners* • *Clients* • *Community members* • *Advocacy groups* • *People who will be making decisions about the program, such as taxpayers, partners, and funding agencies*	*Examples:* • *Assist in developing the evaluation plan* • *Provide feedback on how to focus the evaluation* • *Facilitate implementation of parts of the evaluation* • *Participate in meetings and discuss evaluation findings* • *Disseminate the evaluation results*

3. Have you conducted an evaluability assessment (i.e., an assessment that helps to determine areas of strengths and weaknesses that is completed before initiating the evaluation process and determines whether an evaluation will likely improve the program) that indicated you were prepared to move forward with the evaluation process?

   ☐ Yes ☐ No

   If you answered no, consider completing the Clearinghouse Program Evaluability Assessment Checklist.

4. Is there a program logic model that demonstrates the program's components and the changes that you can expect to see as a result of the program?

   ☐ Yes ☐ No

5. If yes, use the program logic model to assist in selecting measures for the program evaluation. Check all of the components that are included with your logic model:

   ☐ Resources
   ☐ Inputs
   ☐ Activities
   ☐ Goals
   ☐ Outcomes
   ☐ Other_________________________

6. If no, develop a program logic model to assist in mapping out the program's components and the changes you expect to see as a result of the program. For assistance with building a logic model, please see the Children, Youth, and Families at Risk (CYFAR) Logic Model Builder here: https://cyfar.org/tools/Account/LogOn?ReturnUrl=%2ftools%2fLogicModel%2fList

PHASE 2: Design and Conduct the Evaluation

1. What type of evaluation do you plan on conducting?

   ☐ Process Evaluation (i.e., determines whether program activities have been implemented as intended)
   ☐ Outcome Evaluation (i.e., measures program effects in participants by assessing the progress in the outcomes that the program strives to achieve)
   ☐ Impact Evaluation (i.e., assesses program effectiveness in achieving its ultimate goals)
   ☐ Unsure
   ☐ Other__________________________

2. Think about how you answered the first question in this planning guide - what do you want to get from the evaluation (e.g., Is the Love and Logic program improving parent and child attachment among more than 75% of participants?). Remember that your evaluation questions should be connected to the goals, activities, and outcomes of your logic model.

List the questions that you would like to answer through the evaluation.

Evaluation Questions
1)
2)
3)
4)
5)

3. Please list some potential measures that will assess your evaluation questions, their data collection time points (e.g., pre-test, post-test, 3 month follow-up, 6 month follow-up), and methods used with participants to collect data.

Potential Measures	Data Collection Time Points	Method
		Examples: • *Surveys (e.g., personal, mail, email, or phone)* • *Group discussion/focus groups* • *Observation* • *Document review (e.g., records, diaries, logs)* • *Reliable and valid instrument* • *Create an instrument*

4. Do you know of any restrictions or special permissions that need to be obtained regarding how or when data can be gathered? For example, if you are collecting data from students and teachers, consider how privacy, school policy, and the school's calendar might impact data collection. Describe any special permissions or policies that you need to consider when planning for data collection:

5. Please list the date by which the evaluation must be completed. Use the note section below to record any other key dates that pertain to the evaluation process, such as a date that a funder is requesting data on program effectiveness or a timeline for completion.

   Evaluation's Expected Date of Completion: ________________________________

   Notes:

6. Do you have available funding for the Evaluation?

   ☐Yes ☐No

7. Please list the budget you have allocated for conducting the evaluation.

Evaluation Plan Budget	$

8. If you need to identify some potential funding sources, please check some possible sources that could assist you financially:

   ☐Grant Funding ☐Community Funding
   ☐Financial Donations ☐Corporations ☐Other_________

9. A thoughtful analysis will help you generate an in-depth understanding of the issue or problem and help develop an action plan for addressing the issue or problem. How long do you anticipate data analysis to take?

   Start Date: _____________________________

   End Date: ______________________________

10. Please list the members of the evaluation team and any external experts who will participate in the data analyzation process:

Members of Data Analyzation Team	Internal or External to Evaluation Team
1)	
2)	
3)	
4)	

Phase 3: Communicate Findings and Use the Results

If the findings of the program evaluation demonstrate positive results, sharing the findings from the evaluation with stakeholders, community members, and funders can help increase support for and confidence in your efforts, provide justification for further funding, and secure buy-in. If the findings from the evaluation demonstrate little to no positive findings, the evaluation team needs to determine and discuss next steps for the program.

1. Please review the table below to assist you in planning for next steps once your evaluation results have been identified. As an evaluation team, discuss what kind of results you believe will come from the evaluation. Select the box that best reflects your hypothesis. Review the statements next to the checkpoints to preview what next steps you may need to take given your evaluation results. For example, if the evaluation demonstrates that the program had no significant impacts on your target population, your evaluation team would need to decide if the program should continue to be implemented or if another program more likely to have an impact on your target population should be implemented.

Evaluation Results	Next Steps
☐ All Measured Outcomes	✓ Provide validation for continuing implementation of the program ✓ Create program buy-in from the community, stakeholders, and the target audience
☐ Some Measured Outcomes	✓ Improve program implementation
☐ No Measured Outcomes	✓ Determine if the program should continue to be implemented ✓ Assist the evaluation team in selecting a program that will be more likely to have an impact on the targeted population

2. Consider what methods you could use to disseminate information from your evaluation to the groups listed in the following table. What would be the best way to reach the targeted audience? For example, an infographic and social media write-up might be two appropriate outlets to disseminate evaluation findings to community members. Complete the table below.

Groups/People Receiving Evaluation Results	**Methods to Disseminate Evaluation Results and Updates**
See below	*Examples:* • *Public Presentation* • *One Page Summary* • *Digital Newsletters* • *Email* • *Infographic* • *Social Media* • *Report*
Evaluation Team	
Stakeholders	
Community Members	
Funding Sources	
Organizational Leadership	
Other	

Please Note*: This tool was developed based on the review of Literature and Tools related to program evaluation.*

The Clearinghouse has Technical Assistance (TA) Specialists who are available to help by offering support and guidance through the program selection, implementation, and evaluation process. The TA Specialists are available from 9 a.m. to 5 p.m. EST/EDT Monday through Friday. Use the information below to contact the Clearinghouse!

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