

Tips for Planning Your Evaluation

1. Communicate and Collaborate

- Planning an evaluation is not a solitary exercise!
- Consult with a variety of stakeholders, which may include:
 - Administrators
 - Managers
 - Service providers
 - Clients
 - Funders
- Ideally, consultations will be ongoing and key stakeholders will be actively involved in planning the evaluation.



2. Know Your Program



- Be familiar with the program* you are evaluating:
 - Program goals and objectives
 - Activities or services provided
 - Target audience
 - Resources
 - Expected outcomes (short- and long-term)
- Strategies to know your program:
 - Conduct literature reviews and environmental scans
 - Review program documents and administrative data
 - Develop a logic model
 - Consult with stakeholders
 - Interview key informants
 - Conduct site visits
 - Participate in program meetings

Evaluation can also be conducted on projects, initiatives, interventions, policies, or strategies.

3. Know What is Expected

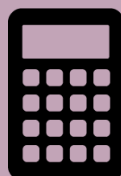
- Have a clear understanding of the purpose of the evaluation, including how it will be used and by whom.
- Many stakeholders do not have expertise in evaluation and rely on you to provide advice on the scope and objectives of the evaluation.
- Consider all perspectives but also prioritize what is needed from the evaluation.
- Managing expectations about what the evaluation can and cannot achieve is an important role for the evaluator.



4. Keep it Realistic and Practical

Find a balance between what is the ideal way to evaluate the program and what is practical and realistic in terms of:

- The resources available (time, money, people)
- The impact it will have on clients, staff and service delivery



5. Build on What is Available

- Consider what information is available and options for building on existing projects.
- Many programs collect information on clients and services or are involved in quality improvement projects – these are potential sources of data that can be used in an evaluation.
- Using or building on existing sources of information can:
 - Minimize the amount of data that needs to be collected
 - Reduce the burden of data collection on service providers
 - Make the most of limited resources



6. Planning is Ongoing and Iterative

- Plans for evaluation often evolve as programs grow and change.
- Planning an evaluation requires:
 - Flexibility
 - Time
- Evaluation plans are often revised and updated even after the evaluation is underway.
- This highlights the importance of ongoing communication and consultation with key stakeholders.



7. Share the Evidence

- Identify your communication goals, objectives, and target audience(s)
- Consider how best to communicate the evaluation findings to each audience in terms of:
 - Timing
 - Style
 - Tone
 - Method of delivery
- Strategies for communicating findings may include:
 - Reports
 - Briefs
 - Infographics
 - Presentations
 - Posters
 - Videos
 - Newsletters
 - Websites
 - Social media
 - Publications



8. Evaluation Resources

Centers for Disease Control and Prevention. (2011). *Developing an effective evaluation plan*. http://www.cdc.gov/tobacco/tobacco_control_programs/surveillance_evaluation/evaluation_plan/index.htm

Posavac, E. J. (2016). *Program evaluation: Methods and case studies* (8th ed.). New York, NY: Routledge

W.K. Kellogg Foundation. (2017). *The step-by-step guide to evaluation*. <https://www.wkkf.org/resource-directory/resource/2010/w-k-kellogg-foundation-evaluation-handbook>

9. Contact Us

The Knowledge Exchange team offers evaluation support to Recovery Alberta teams. Contact us to submit a request.

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