**Evaluation Plan Outline Introduction**

An evaluation plan should be used to guide implementation of evaluation processes. It provides detail on responsibilities, timing and processes for the evaluation team and should be carefully managed.

• The plan should be regularly reviewed and adapted where necessary to reflect changes to projects or programs.

• Where changes occur, your team should plan for efficient communication of changes in activities and/or responsibilities, and distribution of the revised plan to relevant stakeholders.

• Regular team meetings where issues or problems can be addressed will support effective evaluation processes.

Ensure the timely implementation of evaluation processes as detailed in the plan. In particular, evaluators should establish relationships to access and share information, identify sources of support, and implement monitoring programs to facilitate information collection.

For ease of reference, this template uses the term “**program**” or to refer to “what you are evaluating,” though you may be evaluating activities such as policy work or community mobilization. Supporting document such as the Project Flow Diagram, Project Theory Diagram and Evaluation Diagram you created on the EvaluatioCo.org website, and the Good Evaluation Questions Checklist will help you complete this document.

This outline is based on **Learning and Growing through Evaluation.** For additional information and guidance on completing an evaluation plan, please refer to the Evaluation Plan Full Template on the TobaccoFreeCO website.

**Plan to Evaluate: [Project Name or Evaluation Title]**

**Please complete the following sections:**

1. **Title Page**

Agency Name:

Project Name:

Prepared by:

Date:

1. Introduction and Project Description of [Project Name]

*(Please refer to your Project Flow Diagram and Project Theory Diagram to help you complete this section.)*

*In this section, please include:*

* *Purpose of the evaluation*
* *Brief Program Description and Evidence Base*
* *Need for the program*
* *Population(s) Addressed*
* *Stage of Program Development [e.g., project development, planning, implementation]*
* *Resources/Inputs*
* *Activities*
* *Outputs*
* *Outcomes*

1. Evaluation Design

*In this section, please include:*

* *Evaluation questions* 
  + *Clearly state your evaluation questions.*
  + *Refer to the Evaluation Diagram you developed in the Evaluationco.org module*
  + *For help identifying strong evaluation questions, refer to the* ***Good Evaluation Questions Checklist***
* *Evaluation design*
  + *What design will you use to conduct your evaluation? (Several examples of evaluation designs include pre-post within the population or with comparison group, time-series, case study, post-test only, or experimental)*
  + *What is the rationale for using this design [Make sure that the design fits the evaluation questions e.g., that the design answers the question(s) being asked]?*

|  |  |
| --- | --- |
| **Table 1. Evaluation Questions and Study Design** | |
| **Evaluation Question** | **Evaluation Design** |
| 1. |  |
| 2. |  |

4. Gather Credible Evidence

*In this section, describe how you will gather data for your evaluation. Provide information on:*

* *Data collection methods and timeline*
  + *From whom or from what will you collect data (source of data)?*
* *Data collection instruments*
  + *How will you identify or create your data collection instruments?*
* *Complete* **Table 2. Evaluation Questions and Associated Data Collection Methods** *below and copy in your plan. Columns for Person Responsible and Due Date can be used for internal planning purposes and are not required components for your evaluation plan.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Table 2. Evaluation Questions and Associated Data Collection Methods** | | | | |
| **Evaluation Question** | **Data Collection Method or Data Source** | **Activities Needed** | **Person(s) Responsible** | **Due Date** |
| 1. |  |  |  |  |
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| 2. |  |  |  |  |
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5. Data Analysis and Interpretation

*In this section, please include:*

* + *Criteria or Indicators (what is being measured and how you will determine “success”)*
* *Analysis plan (What method(s) will you use to analyze your data, e.g., descriptive statistics, inferential statistics, qualitative analysis such as content or thematic analysis)?*
* *Complete* **Table 3. Indicators and Methods** *below and copy in your plan.*

|  |  |  |
| --- | --- | --- |
| **Table 3*.* Indicators and Methods** | | |
| **Evaluation Question** | **Criteria or Indicator** | **Analytic Method** |
| 1. |  |  |
|  |  |
|  |  |
| 2. |  |  |
|  |  |
|  |  |

6. Use and Communication of Evaluation Findings

*In this section you should describe:*

* *How the results will be used and shared*
* *What lessons learned, including those about evaluation and evaluation capacity building, should be shared? How will they be documented?*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Table 4. Communication and Reporting Plan** *(Adapted from Russ-Eft and Preskill, 2001, pp. 354–357)* | | | | | |
| **Audience 1: *{insert name of audience}*** | | | | | |
| **Applicable? (Yes/No)****√√** | **Purpose of Communication** | **Possible Format** | **Possible Message** | **Timing/ Dates** | **Notes** |
|  | Include in decision making about evaluation design/activities |  |  |  |  |
|  | Inform about specific upcoming evaluation activities |  |  |  |  |
|  | Keep informed about progress of the evaluation |  |  |  |  |
|  | Present initial/interim findings |  |  |  |  |
|  | Present complete/final findings |  |  |  |  |
|  | Document the evaluation and its findings |  |  |  |  |
|  | Document actions taken because of the evaluation |  |  |  |  |

7. Evaluation Management

*Table 5 will help you list out individual roles and responsibilities for your evaluation. You can use this for internal planning. You should also consider developing an internal project timeline for your evaluation. Some questions to consider are listed below.*

|  |  |  |
| --- | --- | --- |
| **Table 5. Roles and Responsibilities of the Evaluation Team Members** | | |
| **Individual** | **Title or Role** | **Responsibilities** |
|  |  |  |
|  |  |  |
|  |  |  |

**Timeline**

* Which planning and administrative tasks are needed, and when will they occur?
* When will training for data collectors occur?
* When will you pilot test data collection instruments?
* When will formal data collection, analysis, and interpretation tasks occur?
* When will information dissemination tasks occur?
* Upon mapping all of the above on a single timeline, are there any foreseeable bottlenecks or sequencing issues?