

Evaluation Planning

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Laura J. Landry & Maddy Verheyden
Judi's House/JAG Institute



Evaluation Trainings

Data Basics

Data capture & basic
data utilization

Program Evaluation Basics

Types of evaluation –
approaches, goals

Theory of Change

Define your model – first
step in planning

Evaluation Planning

Steps – key questions,
design, measures

Objectives

- **Summarize the purpose of developing an evaluation plan**
- **Explain how to use evaluation planning to achieve goals**
- **Identify the essentials elements of a good evaluation plan**
- **Describe the core steps of evaluation planning**



Evaluation Plan Basics



What Do We Mean by Evaluation?



“Evaluation is a systematic and intentional process of gathering and analyzing data (quantitative and qualitative), to inform learning, decision-making and action.”

(Gopal & Preskill, 2014)



Foundations of Evaluation

- **Before the evaluation plan**
 - Evaluation Goal & Questions
 - Logic Model/Theory of Change

Program Evaluation Basics

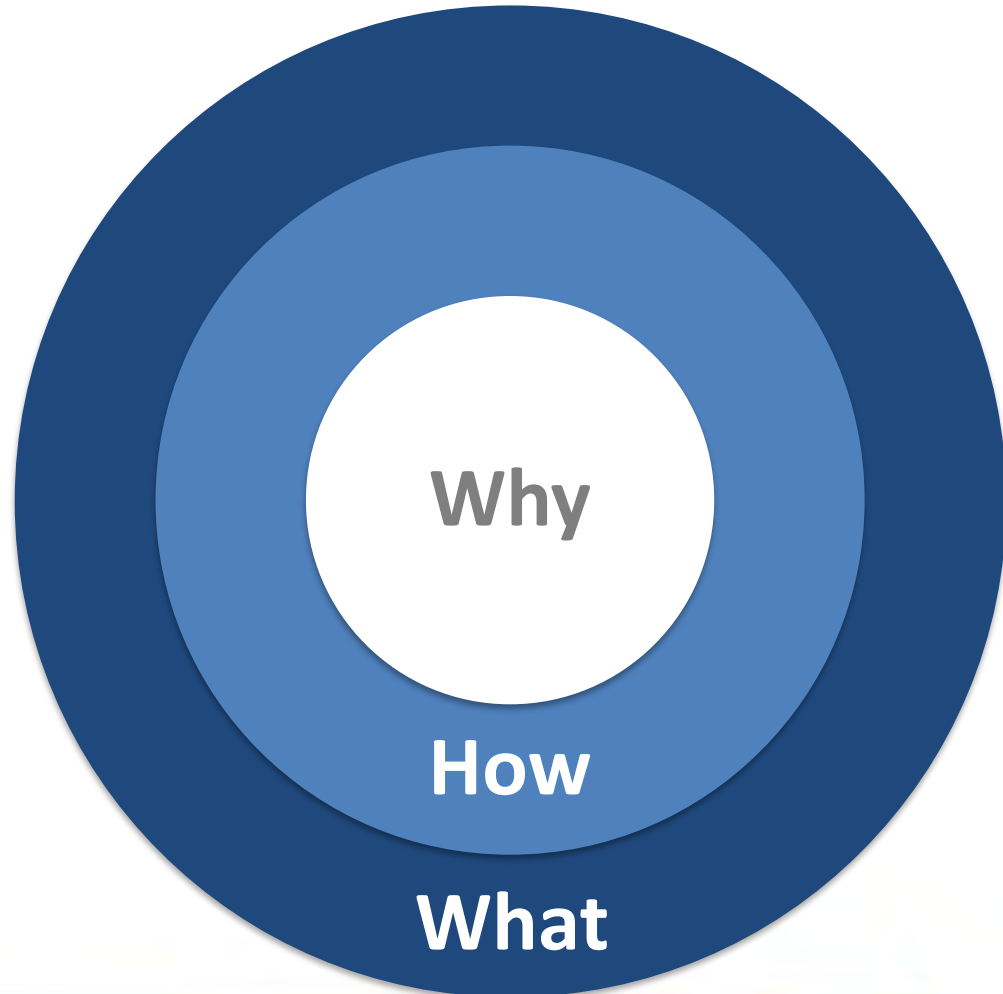
Types of evaluation –
approaches, goals
(NACG website [here](#))

Theory of Change

Define your model – first step in
planning
(NACG website [here](#))



Purpose and Role



- **Why** are we evaluating?
- **How** will we evaluate?
- **What** data will we gather?





Do you currently have an evaluation plan in place at your organization?



Evaluation Plan & Goal Achievement



Why use an evaluation plan?

- **Focus**
- **Accountability**
- **Organization**
- **Stakeholder engagement**
- **Resource allocation**

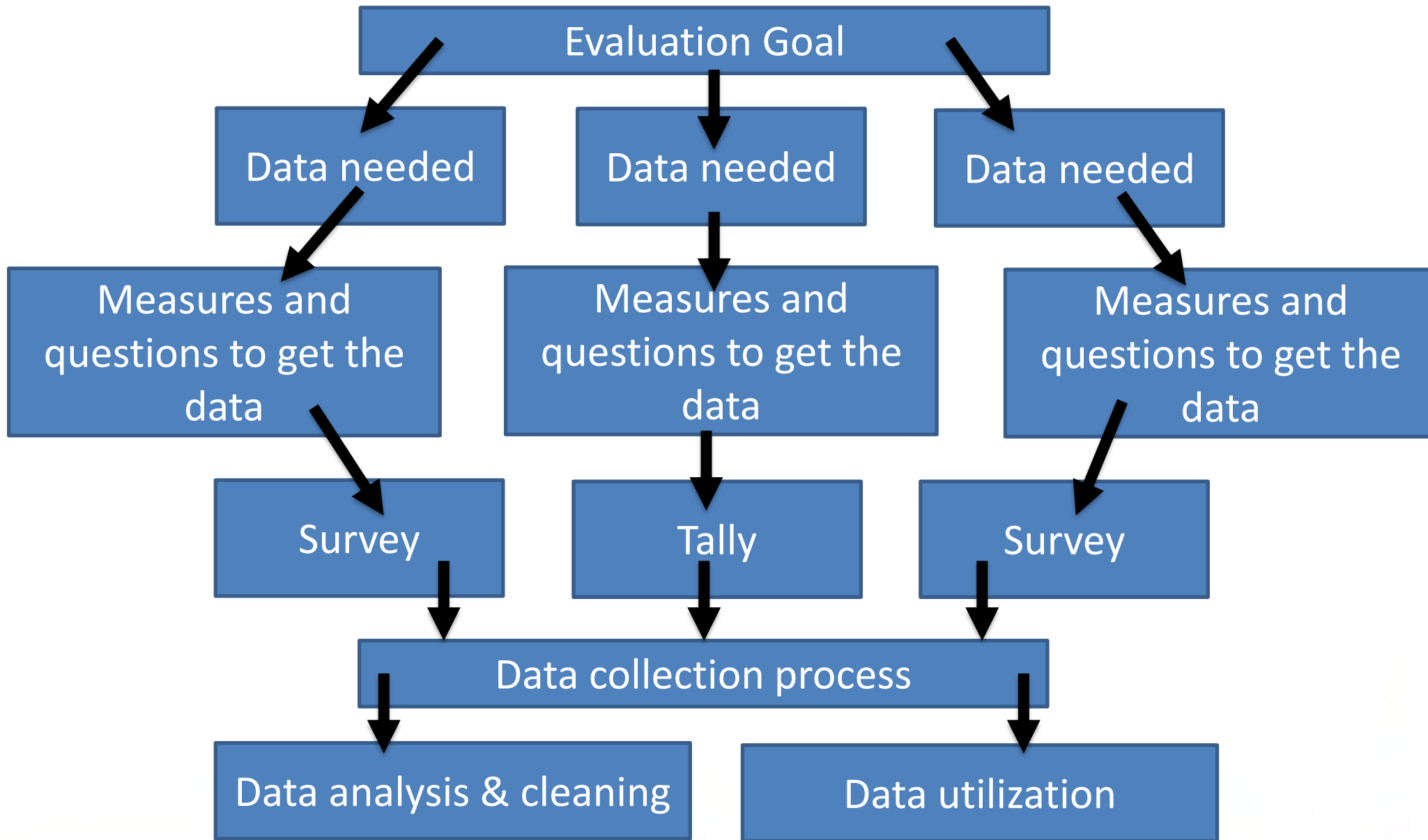




**I HAVE NO IDEA
WHAT I'M DOING**

Essential Elements





Evaluation Plan

Evaluation Plan Sections

1.) Introduction

- Purpose
- Program Description
- Evaluation Focus
- Evaluation Roles

2.) Evaluation Design

- Data Collection Process
- Data Analysis Plan

3.) Data Utilization

4.) Communication & Reporting

5.) Timeline

6.) Future Evaluation

Introduction

- **Purpose**
- **Program Description**
- **Evaluation Focus**
 - Evaluation Goal
 - Evaluation Questions
- **Evaluation Roles**



Purpose Statement

- The purpose section will include the “why” to your evaluation.
 - Why engage in evaluation?



Purpose Statement

Example



Sunrise Grief Center will be conducting new evaluation work within the Peer Support Group program.

We are engaging in this work to better understand who is utilizing our services, if we are reaching all those in need, and if we are providing services as intended.

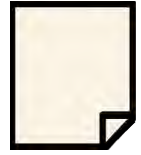
Program Description

- **Program process/overview**

Description of the program or process being evaluated

- What is the program?
- What does the program look like?

Program Description



- **Program process/overview**

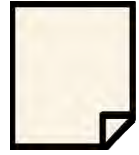
Sunrise Grief Center offers peer support groups for children ages 6-18 and their caregivers. Grief Groups meet once every other week in-person and are provided at no cost.

Program Description

- **Program process/overview**
- **Current evaluation practices**

- **What are the current practices related to evaluation?**
- **Are you currently collecting any data for this program?**
- **What does data collection currently look like?**

Program Description



- Program process/overview
- Current evaluation practices

Data Collector Name	Data Collector Type	Timing	Current Purpose
Intake Assessment	Paper survey	After initial call	Collect key information about participants for reporting
Attendance sheet	Paper form	Daily	Track who is at group to create a count

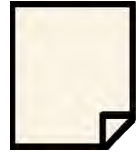
Program Description

- Program process/overview
- Current evaluation practices
- Logic model

Description of what a program does & what its outcomes are

A visual summary of the program

Program Description

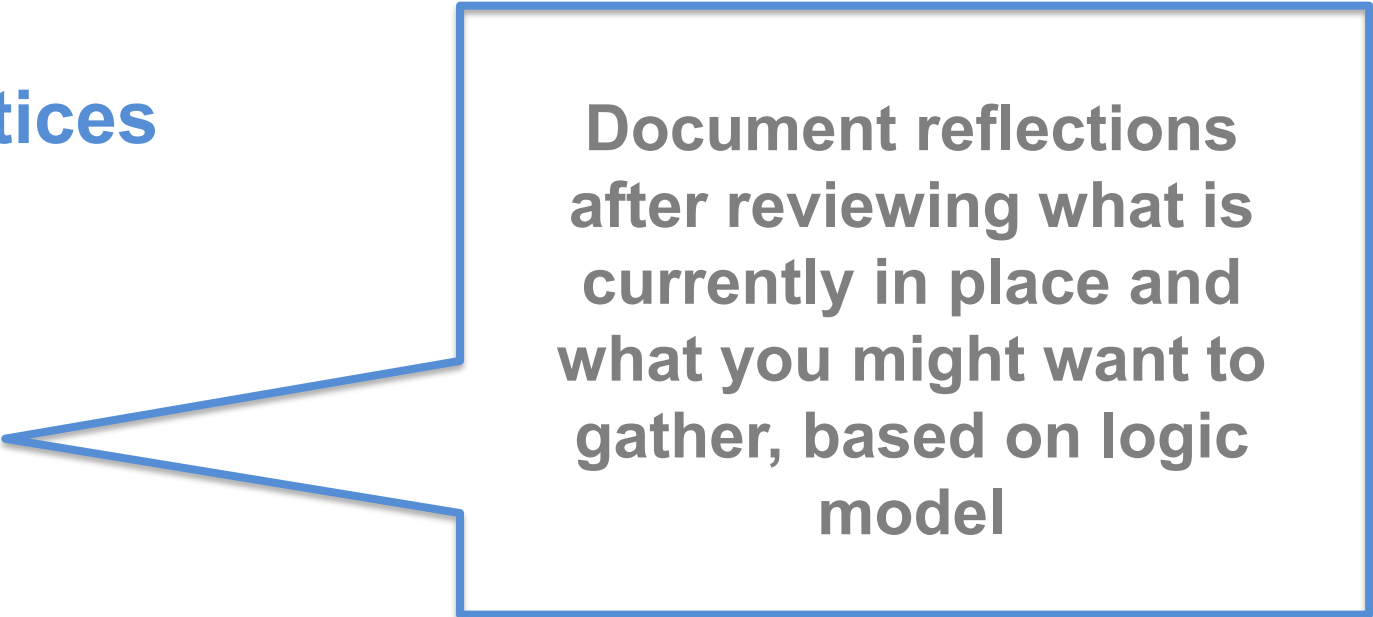


- Program process/overview
- Current evaluation practices
- Logic model

Goal	Inputs	Activities	Outputs	Impacts
<ul style="list-style-type: none">• Promote healthy adjustment to loss through connection	<ul style="list-style-type: none">• Volunteers• Funding• Meeting space	<ul style="list-style-type: none">• Facilitate peer support groups for children• Collect data on who attends• Serve a meal prior to group	<ul style="list-style-type: none">• # of children served• # of sessions• Hours of service• # of volunteers• Average # of sessions attended	<ul style="list-style-type: none">• Increased hopefulness• Increased sense of community and belonging• Decreased feeling of isolation in grief

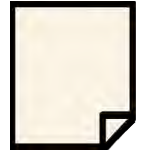
Program Description

- Program process/overview
- Current evaluation practices
- Logic model
- Gaps being addressed



Document reflections after reviewing what is currently in place and what you might want to gather, based on logic model

Program Description



- Program process/overview
- Current evaluation practices
- Logic model
- Gaps being addressed

Recognized that we need to gather data on who attended, not just track counts of attendance, to connect attendance data to outcome data in future.

Evaluation Focus

- **What is the focus of your evaluation?**
 - Evaluation goal
 - Evaluation questions



Evaluation Focus

- **What is the focus of your evaluation?**
- Evaluation goal
- Evaluation questions

Example:  Sunrise Grief Center

This process will address the following evaluation goal:

Collect demographic and family data on participants at enrollment to provide important information on who we are serving. Analyze existing service data along with new attendance data gathered each night of group to determine if services are being offered as intended.

Evaluation Focus

- **What is the focus of your evaluation?**
- Evaluation goal
- **Evaluation questions**

Example:



We intend to answer these questions at the end of this process:

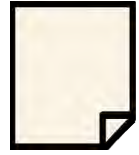
- **How many participants are we serving?**
- **Who are we serving?**
- **Are we providing services as intended?**
- **How many services did we provide?**

Evaluation Roles

- **Who will lead the effort**
- **Who is a part of the team**
- **Responsibilities of each team member**
- **Optional**
 - **Timeframe of tasks**



Evaluation Roles Example



Name	Role	Responsibilities
Jenny Pretend	Director	<ul style="list-style-type: none">• Oversee evaluation• Assign tasks• Design tools• Train facilitators
Mike Fake	Coordinator	<ul style="list-style-type: none">• Conduct literature review• Oversee data collection• Monitor data• Clean data
Chris Invented	Intern	<ul style="list-style-type: none">• Test tool• Enter data

Evaluation Roles Example



“Jenny Pretend, the director of Sunrise Grief Center, will oversee the evaluation, assign tasks, design tools, and help train facilitators. Mike Fake, the coordinator at Sunrise Grief Center, will support the evaluation by conducting a literature review, overseeing data collection, monitoring data, and cleaning data. Chris Invented, an intern at Sunrise Grief Center, will play a key role in testing tools and entering data.”

Section 2

Evaluation Design

AKA: Methodology

**Strategy for your
research approach**



Evaluation Design

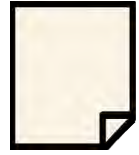
AKA: Methodology

- **Addressing Evaluation Questions**

Describe how evaluation questions will be broken up for data collection

Will this be done in phases?
Will there be a pilot?

Evaluation Design Example



“Addressing Evaluation Questions

To reach the evaluation goal, guiding questions have been broken down to identify how we to plan to answer them:”

Question	Data required	Data Collection	Method
How many participants are we serving?	Count data of all participants and families. Ability to match participants to families.	Intake assessment and Attendance sheets (current) Additional details added by volunteer to match attendance to distinct participants	Intake assessment Attendance Sheets Attendance tally

Evaluation Design

AKA: Methodology

- **Addressing Evaluation Questions**
- **Description of Population**

Who are you collecting data from?

What will the sample look like?

How will someone meet criteria to be part of the evaluation process?

Evaluation Design Example



“Sunrise Grief Center provides support to children and families grieving a death. Services are provided to children ages 6-18 and their families at no charge. Most families who participate in peer support groups live in and around the Green Bay area. We will ask all families to participate in the evaluation.”

Evaluation Design

AKA: Methodology

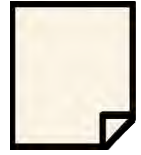
- **Addressing Evaluation Questions**
- **Description of Population**
- **Data Collection Plan**

Data Collection Plan

- What data is being collected?
- How is the data being collected?
- When is the data being collected?
- What measures are you using?
- Who is the data being collected from?
- Who is entering collected data?
- What database will data be entered in?
- How will the data be monitored?



Evaluation Design



“The evaluation will refine current data collection processes to capture who we serve in addition to introducing new data collection processes and forms.

1. Deploy new data collectors developed to answer evaluation questions
2. Routinely monitor and analyze data to search for trends
3. Continue data collection when discussing data utilization
4. Revise process as needed when issues are identified
5. Strategize Action Plan to respond to data trends
6. Determine with Evaluation Team if this data collection will continue and for how long”

Evaluation Design



Data Collection

Data Collection by Timepoint		
Attendance Tally	Timing	Weekly
	Format	Spreadsheet tally, some data taken from attendance sheet
	Data Collected	Distinct counts for participants and families separated by group
	Follow-up process	Volunteer responsible will reach out to group facilitator if any missing data

Evaluation Design





Does your organization currently map out your data collection plan?



Evaluation Design

AKA: Methodology

- **Addressing Evaluation Questions**
- **Description of Population**
- **Data Collection Plan**
- **Data Analysis Plan**

Includes:

- **Cleaning the data**
- **Analyzing the data**
- **Connecting data to evaluation questions**

Data Analysis Plan

- **Cleaning the data**

Incorrect Data

Spelling errors

**Group
Type**

Adolescent

Adolesent

Adelesent



Data Analysis Plan

- **Cleaning the data**

Bad Formatting

Formatting errors

Date

May 4, 1977

5/4/1977

1977.05.04



Data Analysis Plan

- **Cleaning the data**

Duplication

Duplicate entries

Client IDs
4545
4545
4546



Data Analysis Plan

- **Cleaning the data**

Missing Data

Missing values

Family ID	Client ID	Name
8765	JOY8765	Joyce
8765	JON8765	Jonathan
8765		Will



Data Analysis Plan



“First, the team will clean the data. This includes removing incomplete responses and identifying missing data.”



Data Analysis Plan

- **Cleaning the data**
- **Analyzing the data**

How will data be analyzed?

What is the plan for analysis?



Data Analysis Example



“First, the team will clean the data. This includes removing incomplete responses and identifying missing data. Then, the team will analyze the data using descriptives (mean, median, mode, etc.) .



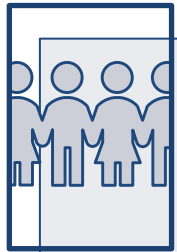
Data Analysis Plan

- **Cleaning the data**
- **Analyzing the data**
- **Connecting data to evaluation questions**

What does all this data mean in terms of your evaluation questions?

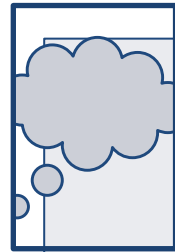


Data Analysis Examples



Who are we serving?

- Demographic summaries



What services are we providing?

- Counts and calculations based on tallies



What is our impact?

- Pre-test and post-test score changes



Data Analysis Example



“First, the team will clean the data. This includes removing incomplete responses and identifying missing data. Then, the team will analyze the data using descriptives (mean, median, mode, etc.) . From there, we will use the data to answer the identified evaluation questions and inform the overall goal.”



Data Utilization

- **How the data will be utilized by the organization?**
 - Document current program efforts
 - Process improvement
 - Program improvement
 - Decision-making
 - Inform future evaluations



**Begin with the
End in Mind**



Data Utilization

- **How the data will be utilized by the organization?**
 - Document current program efforts



Data Utilization

- **How the data will be utilized by the organization?**
 - Document current program efforts



Who are we serving?



What services are we providing?



Data Utilization

- **How the data will be utilized by the organization?**

- Document current program efforts
- Process improvement

- **Finding:** Missing a lot of attendance data
- **Process Improvement:** Better nightly tracking



Data Utilization

- **How the data will be utilized by the organization?**

- Document current program efforts
- Process improvement
- Program improvement

- **Finding:** Coping skills
- **Program Improvement:**
Additional time focused on coping skills



Data Utilization

- **How the data will be utilized by the organization?**

- Document current program efforts
- Process improvement
- Program improvement
- Decision-making

- **Finding:** High # 11-13 year olds
- **Decision:** Additional middle-school age group



Data Utilization

- **How the data will be utilized by the organization?**

- Document current program efforts
- Process improvement
- Program improvement
- Decision-making
- Inform future evaluations

- What went well?
- What did not go as planned?
What should be changed for the next cycle?
- What were some lessons learned during each part of the evaluation?



Data Utilization



“The evaluation findings will be used to guide ongoing decision-making and program improvement efforts. The results will also be used to document the effectiveness of the stated goal.”



Communication & Reporting

- Who will you communicate with?

- Funders
- Stakeholders

Communication & Reporting

- Who will you communicate with?
- How will you communicate?

- Informal/Formal meetings
- Email

Communication & Reporting

- **Who will you communicate with?**
- **How will you communicate?**
- **How will you report the results of the evaluation? When?**

- **PowerPoint**
- **Word documents - Reports**
- **Dashboard**

Communication & Reporting Example



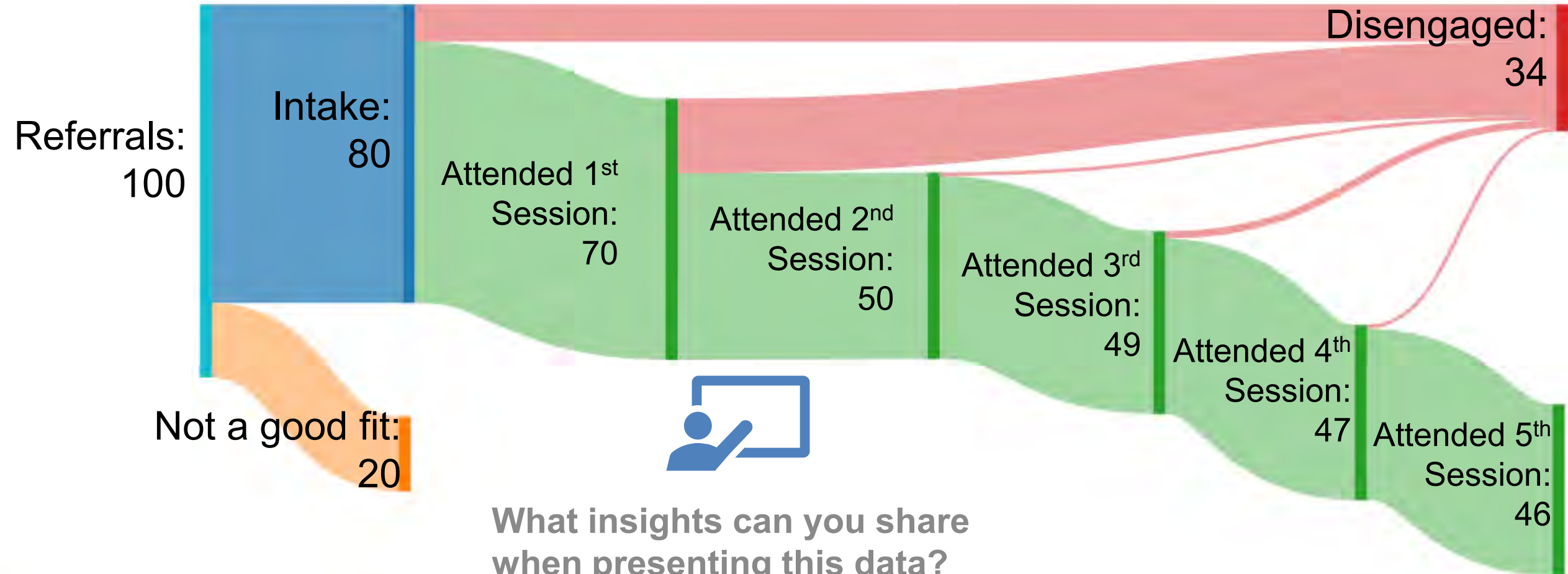
“Updates will be given via informal meetings and through email communication. The team will schedule a data discussion with program team members to aid with interpretation of results. The findings will be communicated to Sunrise Grief Center leadership via an annual report.”



Report Example



What services are we providing?





How does your organization typically report data?

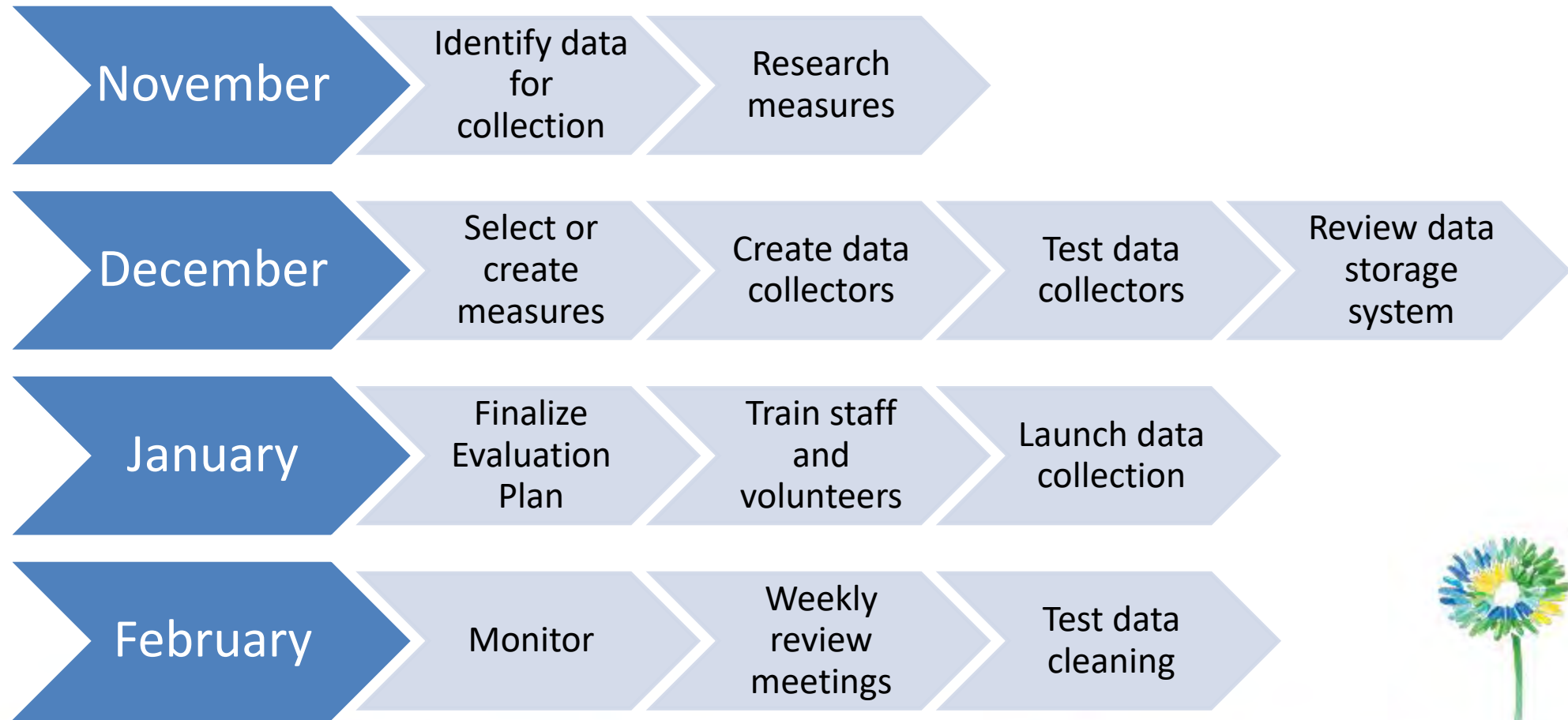


Timeline

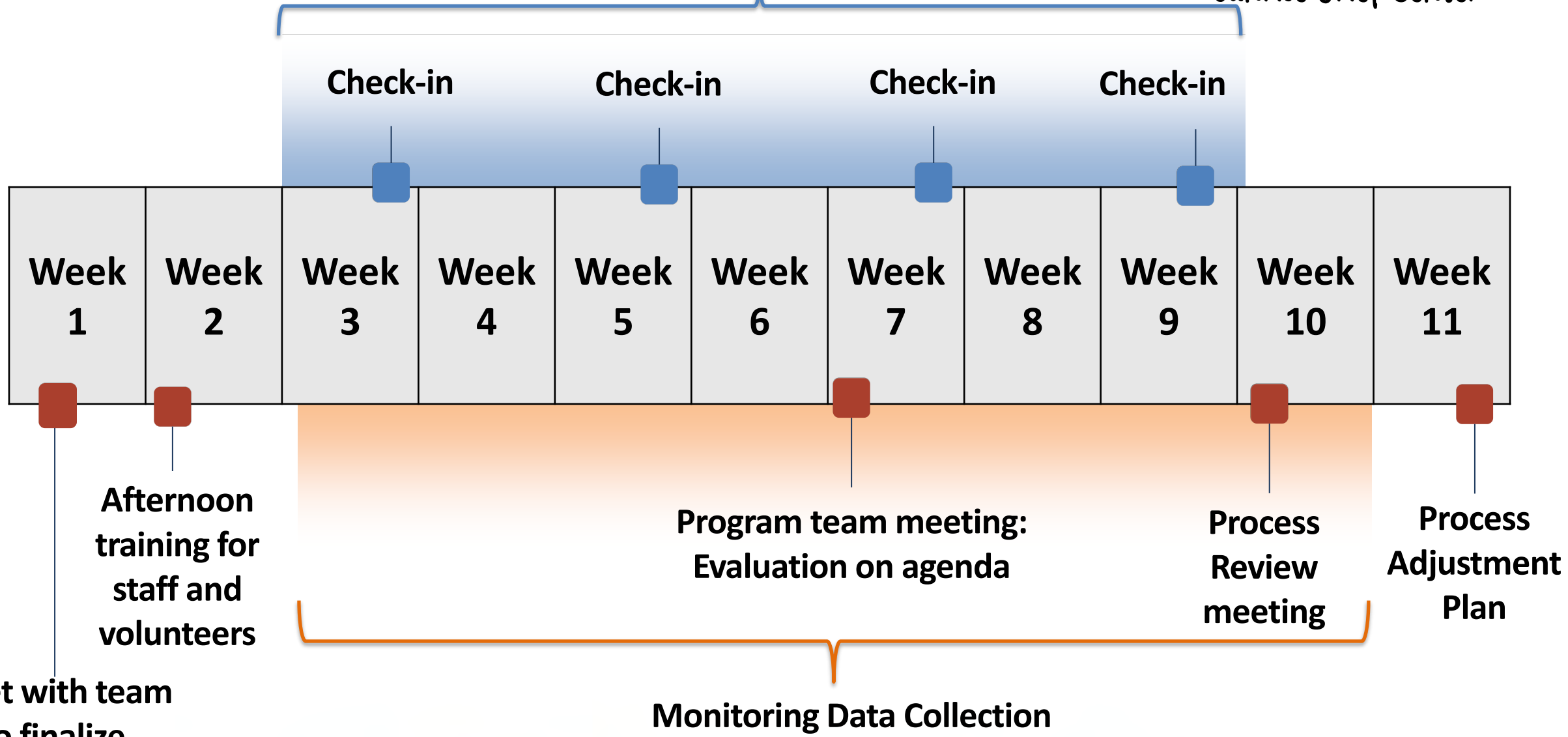
- **Calendar of Milestones**
- **When will data collection begin?**
- **When should data analysis begin?**



Timeline Example



Data Collection: Wednesday night groups



Meet with team to finalize collectors

Timeline

- High level?
- Lots of detail?
- **Minimum = Major milestones**



Timeline

- **Minimum = Major milestones**

Update Intake Form by July 15, ready to review with team and launch by August 1



Timeline

- **Minimum = Major milestones**

Review gathered data
after administering new
form for 3 months



Timeline

- **Minimum = Major milestones**

Clean & analyze data by January 11, ready for February Board meeting & Impact Report



Future Directions

- **How will this inform future projects?**
- **What other evaluation questions do you have that have been “pinned?”**



Future Directions



“Planning this process has surfaced several other areas we are interested in evaluating in the future:

- Impact of peer support groups**
- How attendance trends affect impacts**
- Most utilized referrals**
- How most participants hear about our program**

The outcome of the current evaluation plan will also drive additional evaluation efforts based on understanding how effective our responses are.”

Length of Evaluation Plan

- **Does not need to be long to be effective**
- **Should be concise & to the point**
- **Should be specific & accurate**



Core Steps in Evaluation Planning



Core Steps

- ① **Form your team**
- ② **Access example/template**
- ③ **Document ideas, plans, processes**
- ④ **Engage stakeholders**
- ⑤ **Implement!**





Core Steps

1 Form your team

- Program Director
- Program Coordinator
- Intern/Volunteer
- Facilitator
- Board Member





Core Steps

2 Access example/template

- [Centers for Disease Control & Prevention Evaluation Plan Outline](#)
- [U.S. Department of Education Evaluation Plan Outline](#)
- [Illinois.gov Evaluation Plan Outline](#)
- [National Rural Health Resource Center Evaluation Plan Outline](#)

- 1
- 2
- 3
- 4
- 5

Core Steps

3 Document ideas, plans, processes

**Evaluation Focus
Evaluation Roles**

**Data Collection Process
Data Analysis Plan**

Data Utilization

Communication & Reporting

Timeline

- 1
- 2
- 3
- 4
- 5

Core Steps

Who are your Stakeholders for Evaluation?

Those who will help you design the data collection

Those who will help you gather data

Those who will provide data

Those who will analyze the data

Those who will report the data

Those who will utilize data

4

Engage stakeholders





Core Steps

You are ready!

- Use the evaluation plan as a guide to your evaluation
 - **Refer stakeholders to the plan**
- Use the evaluation plan as a reflection tool
- Use evaluation plan to inform future evaluations

5 Implement!



Wrapping-Up



Take Aways

- **The purpose of developing an evaluation plan is to stay organized and prepare for program evaluation.**
- **Using your evaluation plan to guide your work will help you achieve your goals**
- **A good evaluation plan has an introduction, evaluation design, data utilization, communication & reporting, timeline, & future evaluation section**



Learnings from this session



Upcoming Trainings

Data Basics

- July 2023
- Recording of 2022 training currently available online @ NACG website [here](#)

Program Evaluation Basics

- August 2023
- Recording of 2022 training currently available online @ NACG website [here](#)

Theory of Change

- September 2023
- Recording of 2022 training currently available online @ NACG website [here](#)



Questions?



