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
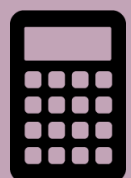
5. Build on What is Available

- 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 AHS teams. Contact us to submit a request.

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Alberta Health Services