Evaluation Planning Template

The purpose of this template is to guide the development of plans for the summative and formative evaluation of education programs or projects. The purpose of this plan is to guide the systematic documentation of progress on program goals and objectives. The evaluation will provide insights on project implementation and project impacts; both in of support of reporting requirements and communication about project progress and successes to the funder, stakeholders, and the broader community.

Project Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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[*Here you will turn your goals into “SMART” outcomes that (specific, measurable, achievable, relevant, time-bound).* 4](#_2s8eyo1)

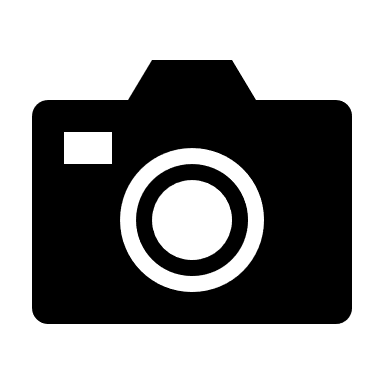
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## PROJECT OVERVIEW

### 1a. Project Snapshot.

*Write a paragraph that provide a brief snapshot of your project, including the project title, funding agency, the start date, number of years the project will be funded, project location, participants, activities, and goals.*

|  |
| --- |
|  |

### 1b. Project Theory of Action

**Problem Statement:**

|  |
| --- |
|  |

## 2. “SMART” PROGRAM OUTCOMES

### *Here you will turn your goals into “SMART” outcomes that (specific, measurable, achievable, relevant, time-bound).*

|  |  |
| --- | --- |
| # | “SMART” PROGRAM OUTCOME |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |

### 

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## 3. PROJECT LOGIC MODEL

*Here you will create a map that connects project inputs and activities to outcomes.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *INPUTS* | *ACTIVITIES* | *OUTPUTS* | *SHORTER-TERM OUTCOMES* | *LONGER-TERM OUTCOMES* |
|  |  |  |  |  |

## 4. EVALUATION QUESTIONS

*Some of these questions are common to many evaluation plans. Some you will write specifically for your program. They are divided into formative, which is throughout the project implementation, and summative, which is at the end.*

**[Formative]**

To what extent are the planned [Project Name] \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ activities being implemented as intended? Specifically:

* 1. Is adequate progress being made on key project activities: 1.\_\_\_\_\_\_\_\_\_\_\_2. \_\_\_\_\_\_\_\_\_\_\_3.\_\_\_\_\_\_\_\_\_\_?
  2. What factors have contributed to the successful implementation of project activities?
  3. What are the challenges to implementation as planned? What adaptations to the original program model have been made as a result of challenges?

Is progress being made towards following shorter-term outcomes: (see SMART outcomes) 1\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; 3\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?

**[Summative]**

Did the project reach the following longer-term outcomes: (see SMART outcomes) 1\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_; 3\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_?

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## 5. EVALUATION DESIGN AND TIMELINES

*Here in these tables you put it all together with the design and timelines for your evaluation.*

### Table 1 Evaluation Plan

|  |  |  |
| --- | --- | --- |
| Evaluation Questions | Indicators/Targets | Data Tool/ Sources |
| 1a. Is adequate progress being made on key project activities 1? |  |  |
| 1a. Is adequate progress being made on key project activities: 2.? |  |  |
| 1a. Is adequate progress being made on key project activities: 3.\_? |  |  |
| 1b. What factors have contributed to the successful implementation of project activities? |  |  |
| 1c. What are the challenges to implementation as planned? What adaptations to the original program model have been made as a result of challenges? |  |  |

|  |  |  |
| --- | --- | --- |
| Evaluation Questions | Indicators/Targets | Data Sources |
| 2a. Is progress being made towards (see SMART outcomes) 1 |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### 

### Table 2 Timeline

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Evaluation Activity | ID | Project Year | | | | | | | | | | | | | | | | | | | | | | | | | |
| YR1 | | | | | | | | | | YR2 | | | | | | | | | YR3 | | | | | | |
|  |  | Q1 | | Q2 | | Q3 | | Q4 | | Q1 | | | Q2 | | Q3 | | Q4 | | Q1 | | | Q2 | | Q3 | | Q4 | |
| **Quarterly Report** | 1 | |  | |  | |  | |  | |  | | |  | |  | |  | |  | | |  | |  | |  |
| **Annual Report** | 2 | |  | |  | |  | |  | |  | | |  | |  | |  | |  | | |  | |  | |  |
|  | 3 | |  | |  | |  | |  | |  | | |  | |  | |  | |  | | |  | |  | |  |
|  | 4 | |  | |  | |  | |  | |  | | |  | |  | |  | |  | | |  | |  | |  |
|  | 5 | |  | |  | |  | |  | |  | | |  | |  | |  | |  | | |  | |  | |  |
|  | 6 | |  | |  | |  | |  | |  | | |  | |  | |  | |  | | |  | |  | |  |