Evaluation WORKSHEET for a Project or Program

Program Name: ________________________________________________

Date: __________________________________________________________

A. What We Believe Overall: Our "Theory of Change"

IF we... (strategies),

THEN this will result in (immediate outcome)

which will lead to (intermediate outcome)

SO THAT over time (intended impact)

(For example, Issue Connect believes “IF we empower more nonprofits to tell their stories more often and in more effective ways, THEN the media will incorporate nonprofit perspectives and frame issues with more community perspective, which will ultimately improve policy and decision making.”)
B. Specific MISSION of This Project

Before you can evaluate, mission and goals must be clear;

The... *(Program Name)*

**works to...** (what it does, for whom, addresses what condition)

**through...** *(how: core strategies and activities)*

**This program strengthens the ability of ....** *(who, what population)*

**to...** *(learn, provide, achieve, educate, advocate for, whatever)*

**so that....** *(what will happen, what change will occur)*
C. REMINDING OURSELVES OF OUR GOALS

*In other words, just to be absolutely clear.....*

The CONDITION we're addressing through this program is:

and the CHANGE we hope to make in that condition is:

D. Evaluation FOCUS for This Year /This Evaluation:

The evaluation goal for this year is to determine whether... / prepare for... / gain insight into . . . BECAUSE....
E. OUR EVALUATION QUESTION/s for This Year

Remember that there is no such thing as a comprehensive, one-shot all-inclusive, 360º evaluation that evaluates your overall.

What is the area you wanted to focus on at this time?
What do you want to learn or understand better?
(“Are we in fact… How well have we been…?” Are we having his particular kind of impact on this group by virtue of doing what we’re doing?”)

The Two “Priority” Questions We Will Ask to Learn What We Want to Know THIS YEAR Are:

1. 
(Ex: “Is our current initiative building a stronger network of relationships between youth organizations, which is a goal we set? How do we know?”)

2. 
(Ex: “Do we really give youth/ a voice/ opportunity/ skills. as our materials claim, and which is a goal we set? How do we know?”)

F. TIMING & BACKGROUND

The block of time we’ll look at is from: to:

We will evaluate the activity that takes place in this area during that period of time.
G. METHODS / How we'll gather information to answer our questions

To answer **Evaluation Question One** (which is

“__________________________________________________?”

(What would be some indicators of change or progress, signs that desired results are being achieved?)

SIGN THAT WE’RE MAKING PROGRESS
Indicator 1:

SIGN THAT WE’RE MAKING PROGRESS
Indicator 2:

We will look at this using the following techniques (check all that apply):

- Record Review
- Focus Group/s with:
- Observation of:
- Survey/s of:
- Interviews of:
- Other:
To answer **Evaluation Question Two** (which is:
“____________________________________________________
____________________________________________________
____________________________________________________?” ) we will examine the following:

**SIGN THAT WE’RE MAKING PROGRESS**
Indicator 1:

**SIGN THAT WE’RE MAKING PROGRESS**
Indicator 2:

We will measure this using the following techniques (check all that apply):

- Record Review
- Focus Group/s with:
- Observation of:
- Survey/s of:
- Interviews of:
- Other:

**H. USES / Dissemination / Audience for the Evaluation**

Once completed, we will share the results of this evaluation with:

- Board and Staff
- Funder/s:______________________________________________
- Other:________________________________________________

We will use it to:

- Plan for next year
- AND:_________________________________________________
I. Responsibilities:

________ ________________________will be responsible for the management and oversight of all evaluation activities, including reviewing plans, progress, findings, implications, etc.

__________________________will be responsible for data collection

__________________________will be responsible for data analysis and reporting

__________________________will review/edit the final report

Board Responsibilities

Timeline:

The final report to be completed by ________________________.

THIS PLAN SUMMARY SUBMITTED BY:
# Characteristics of Less Effective vs. More Effective Evaluation

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<tr>
<th>Planning</th>
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<tr>
<td><strong>LESS EFFECTIVE</strong></td>
<td><strong>MORE EFFECTIVE</strong></td>
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<tr>
<td>Standing where you are and looking backward; evaluating your past work</td>
<td>Standing where you are and looking forward; evaluating your present work</td>
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<tr>
<td>Reconstructing from old records</td>
<td>Planning how you'll keep records from now on</td>
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<td>Seeing evaluation as a one-time “final report”</td>
<td>Seeing evaluation as an ongoing feedback mechanism</td>
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<td>Asking only the question your funder wants answered</td>
<td>Determining the questions you want to answer with input from board, staff, constituents and donors</td>
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<td>Trying to evaluate EVERYTHING; laying out too many questions</td>
<td>Choosing a few key questions or assumptions that you want to examine</td>
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<th>Asking</th>
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<td>Measuring something that isn’t what your core work is all about</td>
<td>Identifying what you really want to know and what you want to see change over time</td>
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<td>Asking how you did against a goal that was never your mission to reach</td>
<td>Goals that are specific, measurable, attainable, relevant, and time-limited</td>
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<td>Only attempting to measure long-term outcomes that are out of your control</td>
<td>Setting goals that directly relate to your organization and its program work.</td>
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<td>Describing activities conducted, but never getting to the stage of drawing conclusions</td>
<td>Drawing conclusions and not being afraid to make adjustments in your program as a result</td>
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<td>Uses only the same people who are directly involved in running operations to evaluate operations</td>
<td>Is as objective as possible, drawing on outside perspectives as well as insider knowledge</td>
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<td>Developing a costly, complicated system for data collection</td>
<td>Looking at existing sources of information first—records, staff observations</td>
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<th>Learning and Using</th>
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<td>Involving staff and stakeholders only at the report stage to hear “conclusions”</td>
<td>Using staff and stakeholders in interpretive roles—asking what this means and what the implications may be</td>
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<td>Assuming that just doing the evaluation is enough</td>
<td>Creating a formal process for incorporating evaluation learning</td>
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<td>Only sharing the positive findings</td>
<td>Ensuring that you have dollars allocated to implement the findings / learning</td>
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<td>Sharing successes and areas that need improvement so that everyone can learn from what you are doing</td>
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SAMPLE Evaluation Summary for a FUNDER

GRANTEE NAME: Association of Health Promoters

MISSION: Support members via learning opportunities and resources, to strengthen collective voice

PROJECT your funding helped to support: Public Speaking Training

CONDITION this project sought to address:
Not enough members consider themselves comfortable enough with public speaking and techniques to undertake public speaking easily on a regular basis

Project’s Desired OUTCOME:
Develop public speaking expertise in members who are hungry for it, and who will inspire others

INDICATOR of Success: 300 members signed up for workshops in 3 states; we had hoped for 200!

INDICATOR of Success: 85% reported that they were now "equipped to proceed with public engagements" where they had felt "anxious or unprepared" before

INDICATOR of Success: 15 volunteered to serve on a new Public Speaking Support and Leadership Committee to advise and encourage peers

STRATEGIES used to achieve these results:
We hired consultants to work with us to develop hands-on trainings for our members, which we piloted after member focus groups and conference discussion. We also...

What’s the LONG-TERM IMPACT you believe the outcomes described above will contribute to helping you achieve over time?
Health promoters will have a stronger collective voice in and beyond their immediate professional circles, and will be better equipped to make new community connections that will ultimately help meet the Association’s fundamental mission.

We’ve added a page of narrative to illuminate some of the above.
**S M A R T Indicators**

- **Specific – Tutoring program**
  
  Bad: 75% of students will improve academically
  
  Good: 75% of students will improve their GPA in the subject of their choosing.

- **Measurable – A small theater company has the goal of expanding their reach.**
  
  Bad: 50% of audiences members tell their friends about performances, Good: On sign-in card, 50% of audience members indicate that they have been told about the performance by a friend.

- **Attainable – A community organizing group has the goal of influencing zoning legislation.**
  
  Bad: All 76 of Chicago’s neighborhood areas will have inclusionary zoning. Good: In the communities where we are active, at least 50% will adopt inclusionary zoning.

- **Relevant – Job training program with goal of keeping people employed to improve their economic situation.**
  
  Bad: 50% of trainees will begin saving their income, Good: 50% of trainees will still be in the job after the first six months.

- **Time bound – An ESL class has the goal of helping participants on the road to citizenship.**
  
  Bad: 60% of participants will enroll in citizenship classes. Good: 60% of participants will enroll in citizenship classes by the end of the ESL course.