# Learn
by YouthREX

# Evaluation Plan Template

Program Evaluation for Youth Wellbeing Certificate

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Research & Evaluation eXchange
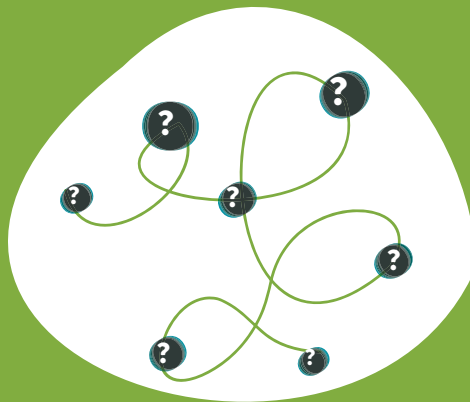
# WHY A WRITTEN EVALUATION PLAN?
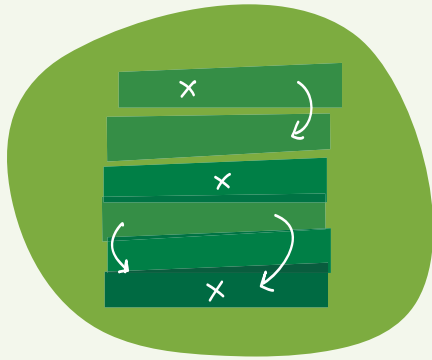
A written Evaluation Plan fosters transparency and ensures that stakeholders are on the same page with regards to the purpose, use, and users of the evaluation results. Moreover, use of evaluation results is not something that can be hoped or wished for but must be planned, directed, and intentional (Patton, 2008).

Just as using a roadmap facilitates progress on a long journey, an Evaluation Plan can clarify what direction an evaluation should take based on priorities, resources, time, and skills needed to accomplish the evaluation. The process of developing an evaluation plan that is focused on needs and priorities identified by the organization will provide a sense of shared purpose.

**A written evaluation plan can:**
- Create a shared understanding of the purpose(s), use, and users of the evaluation results
- Foster program transparency to stakeholders and decision makers,
- Increase buy-in and acceptance of methods
- Connect multiple evaluation activities
- Serve as an advocacy tool for evaluation resources based on negotiated priorities
- and established stakeholder and decision maker information needs
- Help to identify whether there are sufficient program resources and time to accomplish desired evaluation activities and answer prioritized evaluation questions
- Assist in facilitating a smoother transition when there is staff turnover
- Facilitate evaluation capacity building among partners and stakeholders

## 1. PROGRAM DESCRIPTION (PROGRAM INTENT & RATIONALE)

Create a brief overview of the youth program (or proposed program) that you want to evaluate. Consider including some or all of the following:

- **The problem** or **need** the program addresses, including a description of the program's **target population**
- **Expected program results:** the program's vision, mission, goals and objectives all provide info on a program's expected results
- **How** the program arrived at identifying these expected results, such as through a formal needs assessment, observation etc.
- **Program activities**
- **Resources** available to help the program run (number of staff, sites, etc.)
- **The program's funders** and any **reporting requirements**;
- **Context:** for example, any relevant information about the program/organization's history and its location, the area's geography, politics, or social and economic conditions.

## 2. PURPOSE OF EVALUATION

Program evaluation is an important component of all program delivery including comprehensive  youth-focused programs. The focus of any evaluation is determined ultimately by the program  stakeholders' decision-making needs and interests.

There are 2 main areas of focus including:

**1. Examining program processes:** The extent to which the program was implemented as planned, with the intended reach, and to the satisfaction of the participants.
**2. Examining program outcomes:** The extent to which the program has achieved its short term outcomes related to youth knowledge, attitudes and behavior.
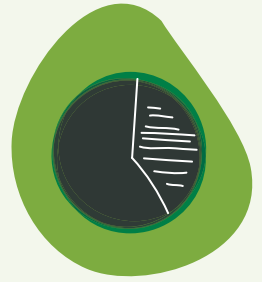
Write a paragraph providing a brief description of why and what the program wants to accomplish with an evaluation. *What are the program's **evaluation goal(s)**? What is the organization striving to achieve by evaluating? If there is more than one goal, identify their priorities.* This could be examining process, outcomes or both. Remember to be  specific to your program.

## 3. KEY STAKEHOLDERS (FOR THE EVALUATION)

Engaging stakeholders in an evaluation can have many benefits. In general, stakeholders include people who will use the evaluation results, support or maintain the program, or who are affected by the program activities or evaluation results.

- Who are the program's stakeholders? How would they use the evaluation findings?
- What role might they play in the evaluation?
- Youth Participation in Evaluation: How does the organization want to involve youth?

Complete the table below to identify the key stakeholders in your evaluation.

| Stakeholder name, position and organization | What role will they play in the evaluation? | How will they use the evaluation findings? |
| --- | --- | --- |
| | | |
| | | |
| | | |
| | | |
| | | |

## 4. PROGRAM THEORY OR PROGRAM LOGIC MAP

Use the **Logic Model Template on page 12** to complete this section.

## 5. KEY EVALUATION QUESTIONS (PROCESS OR OUTCOME OR BOTH)

Consider what the program really wants to know from the evaluation to keep the scope manageable. Avoid asking too many questions or questions that are not amenable to evaluation.

*Good to keep in mind that a single evaluation plan can and often does include both process and outcome evaluation questions. Excluding process evaluation questions in favor of outcome evaluation questions often eliminates the understanding of the foundation that supports outcomes.*

## 6. EVALUATION METHODOLOGY

**Consider the following questions in the methodology stage:**
- What **type of evaluation** (process, outcome evaluation or both)? Why this type of evaluation?
- What **type of evaluation design** (experimental, quasi-experimental, or non-experimental) is suitable for the program based on the stage of development, the reporting requirements of the funder, etc.?
- For outcome evaluation, identify the **outcomes** and **indicators.** Outcome indicators are specific, observable, and measurable characteristics or changes that represent achievement of an outcome.
    - How will you assess the change in these outcomes/indicators?
- **Data collection?** Will this be by qualitative or quantitative methods or both? Surveys, focus groups, observation, document review, etc.?
- What specific **data sources** or **instruments** (e.g., pre/post-tests, standardized forms)?

Select the method(s) most appropriate to answer your evaluation questions.

*YouthREX's Evaluation Framework embraces multiple lines of evidence from multiple methods as a way to improve the rigor of an evaluation.* Consider including multiple data sources and the triangulation of data for reliability and validity of your information.

Based on the methods you have chosen, you may need a variety of data collection methods, such as interviews, focus groups, surveys, etc. Decide on what type of data (either quantitative or qualitative or both) and specifics of how these data will be collected.

Not all methods fit all evaluation questions and often a mixed-methods approach is the best option to answer a particular evaluation question. Note that all data collected needs to have a clear link to the associated evaluation question and anticipated use to reduce unnecessary burden on the respondent and stakeholders.

**The Process and Outcome Evaluation Matrixes** can be helpful in summarizing your overall evaluation plan, and the timeline for evaluation activities. An evaluation matrix can help you align evaluation questions with methods, indicators, performance measures, data sources, roles, and responsibilities as well as facilitate a shared understanding of the overall evaluation plan with stakeholders. You can adapt the evaluation Matrix to your context.
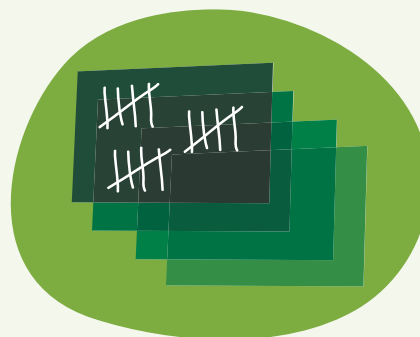
## 6. EVALUATION METHODOLOGY (CONTINUED)

State your evaluation methodology below. Ensure your answer covers the following areas: 1) Evaluation Type and Design, 2) Data Collection procedures, and 3) how you will store and manage your data.

## 7. ANALYSIS & INTERPRETATION

- How will the data that is collected be analyzed?
- Who will be involved in analysis?
- How will the data be contextualized to better understand it?
- How will the data accuracy and quality be ensured -who will check the data, and how frequently?

*Who will get to see interim results? Will there be a stakeholder interpretation meeting or meetings? It is critical that the plan allows time for interpretation and review from stakeholders. The emphasis here is on justifying conclusions, not just analyzing data.*

## 8. USE & SHARING PLANS (INTERNAL & EXTERNAL COMMUNICATION)

The planning stage is a good time to begin to think through how you intend to use what you learn through the evaluation process to improve the program. Include the following:

- Who within the organization will be (have been) involved in the conversation about evaluation results?
- When, and how often, will results be shared internally?
- Who will decide how programs should be changed as a result of the evaluation?
- With which **stakeholders** (e.g., clients, community, funders) will the organization share results?
- Which **setting** and **method** (e.g., written report, focus group, community presentation, video, etc.) will be the most appropriate forum in which to share results with each stakeholder group?
- How will stakeholder feedback be incorporated into decisions about changes to the program?

| Stakeholder name, position and organization | What role will they play in the evaluation? | How will they use the evaluation findings? | How will they use the evaluation findings? |
|---|---|---|---|
| *Who?* | *Why are we informing them?* | *E.g. Report, executive summary, success stories, briefs* | *When will we inform them?* |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |

## 9. ETHICAL ISSUES

Discuss how your data collection processes will ensure, informed consent, confidentiality, anonymity and respect all rights of human research participants. Especially youth participants.

## 10. EVALUATION WORKPLAN

Prepare an evaluation workplan with major milestones (key tasks for the major evaluation phases) with completion dates.

| MAJOR MILESTONES | DUE DATE | RESPONSIBLITY |
|---|---|---|
| **DISCOVERY STAGE** | | |
| Capacity Review Meeting | | |
| Discovery Meeting 2 | | |
| Program logic model and theory of change finalized | | |
| Evaluation plan, including evaluation instruments, approved by organization | | |
| **ACTION STAGE** | | |
| Identification of evaluation participants, scheduling and obtaining of informed consent | | |
| Completion of all focus groups | | |
| Transcription of focus groups and interviews | | |
| Development of coding scheme and analysis | | |
| Meeting with stakeholders to discuss preliminary findings | | |
| Data animation, reporting, synthesis of findings | | |
| **LEGACY STAGE** | | |
| Sharing of findings internally | | |
| Sharing of findings externally | | |

# LOGIC MODEL

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Date:                Status:                Contributors:

PROGRAM:                                         SITUATION:

PRIORITIES:

| INPUTS | OUTPUTS | | OUTCOMES | | |
| --- | --- | --- | --- | --- | --- |
| | Activities | Participation | Short (6-12 months) | Medium (1-2 years) | Long (3-5 years) |
| | | | | | |

# LOGIC MODEL COMPONENTS: DEFINITIONS

## SITUATION

The situation is the context or 'reality' that the program is operating in. This includes stakeholder engagement, defining the root problem or issue that the program was designed to address, and acknowledging relevant social, political, and economic factors. Understanding and acknowledging the broader context should always be the first step in logic modelling. Ex. A low-income neighbourhood with a high rate of high school dropout.

## PRIORITIES

Priorities refer to an organization's top program priorities in relation to the situation. This could include the program's mission, vision, mandates, and intended outcomes. Ex. To foster a sense of community in youth.

## INPUTS

Inputs refer to what is invested into a program or what is available for program activities. Inputs refer to things such as staff, volunteers, time, money, technology, and partnerships. It is important to list inputs because it promotes a realistic evaluation scope by encouraging a 'big picture' understanding of a program.

## OUTPUTS

Outputs refer to what is done in a program (Activities) and who is reached (Participants). Ex. Outputs can include activities like workshops, art jams, counseling sessions, and the youth participants targeted by those activities.

**References**

Taylor-Powell, E., & Henert, E. (1996). Developing a logic model: Teaching and training guide [Training guide]. Retrieved from:

http://www.uwex.edu/ces/pdande/evaluation/pdf/lmguidecomplete.pdf

## OUTCOMES

Outcomes refer to the changes that occur as a result of program activities. A logic model should focus on short-term outcomes, but provide a logical sequence of the chain of outcomes from short-term outcomes (6-12 months; immediate changes in knowledge, awareness, attitudes, skills) and medium-term outcomes (1-2 years; changes in behaviour) to long-term outcomes (3-5 years; changes in the broader community, population). When thinking about program outcomes, it is important to also be thinking about ways that those outcomes can be measured.

It is important to select outcome indicators that are SMART: That is, Specific, Measurable, Attainable, Relevant, and Trackable. Click here to see the 20 *Stepping Up* outcomes related to positive youth development.

## ASSUMPTIONS & EXTERNAL FACTORS

Assumptions refer to the beliefs we have about the program, the youth involved, the situation, and the way we think the program will work. Ex. program may engage youth in activities meant to foster a sense of environmental stewardship. Some assumptions might be: Youth are the best target for this type of programming, a lack of stewardship is the root problem that should be addressed (vs. other factors), and engaging in program activities will foster a sense of environmental stewardship. Faulty assumptions are often the reason for program failures.

External factors refer to elements that affect the program over which there is little control. Aspects external to the program that influence the way the program operates include larger social, political, and economic factors. Ex. Funding and policy shifts.

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**Youth Research and Evaluation eXchange (YouthREX)** is a province-wide initiative based at the School of Social Work at York University.

**OUR MISSION** is to make research evidence and evaluation practices accessible and relevant to Ontario's grassroots youth sector through capacity building, knowledge exchange, and evaluation leadership.

**OUR VISION** is an Ontario where shared knowledge is transformed into positive impact for all youth.

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