EVALUTION TOOLKIT
WORKBOOK

Use in tandem with the
REACH Online Evaluation Toolkit:
http://www.reachprogramscience.ca/reach-pan-evaluation-toolkit/

Last update:
January 2016

WORKSHEET: EVALUATION CHECKLIST

As outlined in the REACH Evaluation Toolkit, there are quite a few steps in the evaluation planning and implementation process. We have created an evaluation checklist to help keep on-track for the duration of your project (see Table 1). This document should be revisited throughout your evaluation project to monitor how the project is progressing on an ongoing basis.

Table 1. Evaluation checklist
Date last reviewed/revised:

Key evaluation activities	✓
1. Describe the program/project/service that is being evaluated Sometimes it is helpful to explicitly describe the program you are planning on evaluating. You might want to include the following pieces of information: • What is the need that the program is addressing? • Purpose of the program - what change(s) are you hoping to make? • Who is the target population the program is working with? • Length or duration of the program • Resources available to implement the program • External contexts or influences that will impact the program • Any theories (social theories, health theories) that you might use to describe, understand and evaluate your program (helpful resource National Cancer Institute's *Theory at a Glance: A Guide for Health Promotion Practice*)	☐
2. Engage stakeholders Have you taken the time to identify, understand and engage stakeholders? **TASKS:** • Complete and use the ***REACH Stakeholder Engagement Worksheet*** as an ongoing tool for your evaluation team • Regularly check-in on your ***REACH Stakeholder Engagement Worksheet*** to review progress, revise, and update engagement plan: Our team will review every _______ months	☐ ☐

3. Design the evaluation Have you clearly articulated the program to be evaluated (e.g. logic model and/or theory of change)? Have you decided on the evaluation design (e.g. process vs. outcome evaluation, participatory vs. utilization-focused evaluation approach, etc.)? Have you created an evaluation plan outlining key questions, indicators, data sources, methods, timeframes and responsibility? **TASKS:**	
• Build a logic model for the program/project/service you are evaluating (be sure to engage stakeholders in this important step). You can use the ***REACH Logic Model Worksheet***.	☐
• Think about evaluation design – what type of evaluation are you planning (process, outcome, impact) and what approach are you going to use for your evaluation? (developmental evaluation, participatory evaluation, utilization-focused evaluation) We will be doing this type of evaluation:___________________________ We will use this approach: ______________________________________	☐
• Develop evaluation questions that will focus your evaluation	☐
• Identify related indicators that will be the data or information that will address your evaluation questions (do you want to use quantitative indicators, qualitative indicators, or a mixed of both to help answer evaluation questions?)	☐
• Use the ***REACH Evaluation Plan Worksheet*** to lay out your plan	☐
4. Evaluation and ethics Have you considered the level of risk associated with your evaluation project for different stakeholder groups? Have you completed the ***REACH Evaluation Ethics Checklist***?	☐
5. Evaluation planning and management Have you incorporated project management practices into your evaluation project (e.g. development of a work plan, budget and risk management strategies)? **TASKS:**	
• Use the ***REACH Work Plan Template*** as a tool for your evaluation – this maps out the tasks involved in the evaluation, who is responsible for which pieces, and maps out the timeline for the project	☐

• Use the ***REACH Budget Template*** as a tool for your evaluation -- this maps out all of the revenue and expenditures for the project (both actual and in-kind)	☐
• Think about potential risk and mitigation strategies that could impede the success of your evaluation. Use the ***REACH Risks Management Strategies*** Worksheet as a tool.	☐
6. Data collection Have you designed data collection tools with feedback from key stakeholders? Have you collected data to answer your evaluation questions? **TASKS:**	
• Working from our evaluation plan develop the necessary data collection tools. We will be creating the following tools (i.e. survey, interview guide, focus group, database, tally sheet, document review tool):	
a) ______________________________	☐
b) ______________________________	☐
c) ______________________________ (add more as needed)	☐
• Develop a recruitment strategy for evaluation participants that casts a wide net. We want to make sure that we have a wide representation of people, groups and demographics in an evaluation.	☐
• Engage participants to gather and collect data ensuring that data is protected following procedures outlined in your ethics guide.	☐
7. Data analysis Have you analyzed all of the data collected in your evaluation? Have stakeholders been engaged to help contextualize the findings and brainstorm recommendations for next steps? **TASKS:**	
• Analyse data – using methods appropriate to the methods (i.e. quantitative data – frequencies, statistics or qualitative data – content analysis)	☐
• Engage your stakeholders in the analysis process to help contextualize the data, identify recommendations from the findings and think about how best to present the data.	☐

8. *Sharing and using evaluation findings* Have you created a communications plan for your evaluation findings? Have you shared evaluation findings with all key stakeholder groups in an engaging format? Have you determined how evaluation findings and recommendations will inform program improvements or adjustments? **<u>TASKS:</u>**	
• Use the ***REACH Communications Plan Worksheet*** to develop a plan on how best to engage key stakeholders in learning about your evaluation findings, recommendations and action plans	☐
• Develop recommendations based on your findings and consultation with stakeholders	☐
• Work from your Communication Plan to develop knowledge translation tools and products – Think creatively about how best to get your message across. A report may or may not be the best way to engage your stakeholder. Some KT products can include: o A reports – if you do write a report think about the 1:3:25 rule for reports, no matter what the topic a report shouldn't be longer than a one-page outline with the main message, three page executive summary and 25 page report CFHI Guidelines FCASS Guidelines o Short summaries, postcards o Presentations that can be used by the program, organization or stakeholders or put up online with narration o Visualizations or infographics o Interactive maps or spreadsheets o Briefing notes o Or many other ideas	☐
• Use the ***REACH Moving Recommendations Into Action*** worksheet to create a plan on how to ensure your organization is going to commit to moving the evaluation recommendations into -- Be sure to build in regular check-ins to ensure that you are on track and if you aren't make sure to adapt or revise the plan.	☐

WORKSHEET: ENGAGING STAKEHOLDERS

Key stakeholders should be engaged throughout all steps of the evaluation process to improve the relevance and utilization of evaluation findings. As outlined in this evaluation toolkit, developing a plan to engage stakeholders should be one of the first steps in the evaluation process. This is a living document and an important tool in your evaluation work. You should review your stakeholder engagement worksheet throughout the course of the project and update and revise as necessary.

Stakeholder engagement is fundamental to evaluation because stakeholders:

- are the ones who will need to determine the focus of the evaluation;
- have in-depth knowledge of the program or organization and the surrounding policy or social/economic contexts impacting the program;
- have access to program records and program participants;
- will assist in understanding and contextualizing the analysis of the evaluation data; and
- will ultimately use the findings and data generated from the evaluation to meet their needs.

When you think about 'who' a stakeholder might be it is important to cast a wide net. They are individuals, groups or organizations who have a significant interest in how the program is running and its outcomes. Examples include: staff or service providers; project partners; funders; evaluation sponsors; program participants, clients or peers; Board of Directors or senior executives; community members; or other experts.

Finally, there are a number of key tasks that you might want to involve stakeholders in, including: providing context and understanding about the program; focusing the evaluation work and identifying evaluation questions; developing or reviewing the logic model; helping with the development of data collection tools; helping with data collection or accessing evaluation respondents; supporting the interpretation of findings and providing context; developing recommendations; creating action-based plans based on the findings; and disseminating the evaluation findings. Stakeholders can have different levels of involvement in an evaluation that can range from being an active participant in all aspects of the evaluation and being part of an evaluation advisory committee, to providing input occasionally, to being informed of the evaluation's progress at a high level, to receiving the final evaluation report and summary documents.

A 'stakeholder engagement worksheet' has been provided to help your identify, understand and involve stakeholders throughout your evaluation (see Table 2 below). Populating each of the boxes in the stakeholder engagement worksheet will help you to critically think about stakeholders' interests in the evaluation and how you can make best use of their time and expertise. Note that the REACH Evaluation Toolkit contains links to documents about stakeholder engagement if you are seeking out additional information. Click here for more information.

Table 2. Stakeholder engagement worksheet
Date last reviewed/revised:

Stakeholder (*Name of person or stakeholder group, such as program manager, program participants, other community-based organizations, etc.*)	**What is their interest in the evaluation?** (*Examples: identifying areas for program improvement, are service recipients, potential for program replication, final evaluation findings, etc.*)	**How will the stakeholder be involved in the evaluation?** (*Examples: member of the Evaluation Advisory Committee, informed about evaluation, provide support, data source, etc.*)
1.		
2.		
3.		

Adapted from:

Centers for Disease Control and Prevention. (2012). Introduction to Program Evaluation for Public Health Programs: A Self-Study Guide. Retrieved from: http://www.cdc.gov/eval/guide/step1/

WORKSHEET: LOGIC MODEL

Before jumping into the evaluation process, it is important that the program to be evaluated is defined in detail. Having a comprehensive understanding of the program's available resources, planned activities and intended changes will greatly support the evaluation planning process.

A key tool to begin mapping out the program is the logic model. The logic model is a systematic and visual way to illustrate the relationships among the program resources, planned activities and intended changes or results the program hopes to bring about. This is sometimes called the program theory. Logic models can be used for program planning and evaluation purposes. From a program perspective, logic models can serve as a useful tool when designing new initiatives and testing program assumptions. From an evaluation perspective, program logic models serve as a key reference point and can provide ideas for creating evaluation questions.

We have provided you with a worksheet to help you draft a logic model for the program you are evaluating (see Table 3). This worksheet provides a brief explanation of each of the logic model categories. As depicted with the arrow, each component of the logic model is intended to build upon the next, from the left to right. For instance, the activity of providing an educational workshop about HIV transmission would result in the short-term outcome of participants having increased knowledge of how HIV is transmitted. It is important to think about the linkages across the logic model and ensure that every activity feeds into an output and outcome and vice versa. Note that the REACH Evaluation Toolkit contains links to entire documents dedicated to creating logic models if you are seeking out additional information. Click here for more information.

It can be useful to engage program staff and other stakeholders in the creation of logic models given their intimate knowledge of the program's resources, activities and intended outcomes. However, it is recommended that you avoid the use of logic model terminology and speak to stakeholders about the how their program works, what they are going to do, and what changes they are hoping to see happen as a result of their work.

Table 3. Logic model worksheet

What resources are needed to operate the program? E.g. funding, staff, partnerships, etc.	*If you have access to these resources, then you can use them to accomplish your planned activities.*	*If you accomplish your planned activities, then you will hopefully deliver the amount of product and/or service that you intended (outputs often described as a # of something)*	*If you accomplish your planned activities to the extent that you intended, then your participants will benefit in certain ways (outcomes are usually described using an action work describing a change)*		
			Outcomes		
			"Expect to see"	"Want to see"	"Hope to see"
Inputs	**Activities**	**Outputs**	**Short-Term Outcomes** • *Achieved during program timeframes* • *Within program control*	**Intermediate Outcomes** • *Achieved at the end of program timeframe* • *Follow from short term outcomes*	**Long-Term Outcomes** • *Achieved after program timeframe* • *Outside direct program control*
•	•	•	•	•	•

Adapted from:

- W.K. Kellogg Foundation: Logic Model Development Guide. https://www.wkkf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide
- PointK Learning Center: Innovation Network. http://www.innonet.org/client_docs/File/outcomes_chain.pdf

WORKSHEET: EVALUATION PLAN

Once you have developed your logic model or program theory it is now time to focus your evaluation. To do this it can be useful to create an 'evaluation plan' to keep track of the key evaluation questions you are asking and how you are proposing to answer them. An evaluation plan can be thought of as a roadmap to your evaluation, describing what will be evaluated, how and when.

The first step is to identify the types of evaluation questions you want to ask. The logic model will identify many different types of questions relating to your program but it is important for your stakeholders to determine which questions are important for them. Evaluation questions can span the range of a program and can include questions relating to the: needs for the program; the resources needed to run the program; how the program is being implemented; are the activities being delivered as intended; are the right participants being reached; are the participants satisfied; are intended changes occurring; what are the unintended outcomes; is the program cost effective; and how is the program contributing to larger changes for the population? Given the potential scope the evaluation questions will need to be focused – you can't look at everything.

Once you have decided on evaluation questions it is time to think about indicators. The indicators are the evidence or information that will tell you if your program is reaching its intended outcomes. There is often more than one indicator needed to measure an outcome, particularly when evaluation questions are complex and deal with many moving parts. Indicators can be quantitative and qualitative, and you may consider using two or more types of indicators to answer one evaluation question. Indicators should be SMART(ER):

Specific	Should be clear to people with a basic knowledge of the issue or program and clearly articulated, well defined and focused
Measurable	Should have the capacity to be counted, observed, analyzed, tested, or challenged.
Achievable	Should be realistic, practical and attainable within the program scope dependent upon availability of resources, knowledge and timeframe
Realistic	State what results can realistically be achieved, given available resources
Time-bound	Should have clear deadlines express
Ethical	Should carefully consider issues pertaining to ethics and the protection of participants
Relevant	Should provide information which is relevant to the process and stakeholders

Once these are decided upon you can work on identifying data sources, building data collection tools (surveys, focus group interview guides, participant observation process, etc.) and deciding on the frequency of data collection. Note that the REACH Evaluation Toolkit contains links to documents with more information about evaluation design if you are seeking out additional information. Click here for more information.

A worksheet has been provided for you to create your own evaluation plan (see Table 4). Populating each of the boxes in this worksheet will help clarify the plan for the evaluation, both for the evaluation team and other stakeholders. Note that some individuals may call the evaluation plan an 'evaluation framework'.

Table 4. Evaluation plan worksheet

Evaluation Questions (*What questions will the evaluation answer?*)	**Indicators** (*How will you measure progress/ accomplishment? What data will we collect?)*	**Data Sources** (*What sources of information do you require to answer the evaluation question? E.g. program participants, general public, organizational administrative data, etc.*)	**Data Collection Method** (*What method(s) will be used to collect information to answer the evaluation question? E.g. online survey, focus group, etc.)*	**Timeframe** (*When will the evaluation question be answered? E.g. Winter 2016)*	**Responsibility** (*Who is responsible for gathering the data that answers this evaluation question?*)
1.					
2.					
3.					

WORKSHEET: ETHICS CHECKLIST

It is critical to keep ethical considerations at the forefront of evaluation planning and implementation. Both evaluation and research involve some level of risk, ranging from high to low risk, for the participants. It is this risk that makes it very important to go through an ethical process when designing and conducting an evaluation. It also allows evaluation teams to determine if the costs to participants are worth the benefits. Strategies to protect the rights and dignity of those who participate in the evaluation should be incorporated into the way that you design and carry out your project – it is important to consider at ALL phases of the evaluation. Many professional organizations have their own set of guidelines, including the Canadian Evaluation Society and the Tri-Council Policy Statement (TCPS)

We have provided a quick evaluation ethics checklist for you to complete that will get you thinking about ethical concerns (see Table 5). Read through these questions and give yourself a checkmark if you have addressed the ethical concerns lists.

It is important to note that it could be necessary to undergo an ethical review with an institutional review board, for instance if there is some debate about whether your work is closer to research than evaluation or if you intended to publish evaluation findings. First, know your organizations' policies with regards to whether you require an ethical review and under what circumstances. Second, you can use a tool like ARECCI guidelines and screening tool provided by Alberta Innovates Health Solutions to explore whether your project requires a formal ethics review (this guide has a lot of great resources relating to evaluation and ethics).

Table 5. Evaluation ethics checklist

Ethical Issues to Consider	✓
1. Weigh the risks and benefits Have you assessed all potential evaluation risks for participants, communities, community-based organizations, third parties, and the members of the evaluation team? Do the benefits of participation outweigh the costs/risks to the participants? Here are some risk categories to consider: • Physical Hazard • Psychological risk • Damage to reputation, privacy or breach of confidentiality life • Non-compliance with applicable laws and regulations	☐

2. Obtain informed consent: Evaluators and evaluation teams must ensure that participants have provided consent for the evaluation that is: • free (voluntary and will not impact services they may receive); • informed (have been provided with all the information they need to make a decision, including benefits and risk of their participation); and • ongoing (provide information throughout the evaluation on how participation in the evaluation will impact a participant). How are you going to ensure that you have obtained informed consent? <u>Here are some procedures that should be implemented:</u> • Including a consent form for any data collection relating to the project, includes information on who is leading the project, description of the project, how confidentiality will be ensured, compensation, where to go if you have questions, a note about voluntary participation (can withdraw at any time and will not impact their relationship with the organization) • If you want to follow-up with participants at a later date (to share findings, ask follow-up questions, etc.) the evaluation team will need to have consent to contact a participant after first contact	☐
3. Ensure privacy and the control of information Evaluators and evaluation teams have a responsibility to ensure the privacy, confidentiality and security of participants' personal information including: • information that directly identifies a participant (name, health number) • information that indirectly identifies a participants (date of birth, address, physical characteristics) that could be together used to identify an individual especially when a samples comes from a small group of people (deductive disclosure) Have you considered issues concerning respect for privacy and confidentiality? Will personal information be collected through assessment activities (including health, HIV status, attitudes, values, concerns, beliefs, habits, social networks, or socioeconomic status, etc.)? How will the confidentiality of this information will be preserved? <u>Here are the procedures that should be implemented:</u> • Ensuring privacy and confidentiality • Anonymity of data where possible (assigning codes or pseudonyms) • Physical safeguards: locked filing cabinets, computer privacy filters • Administrative safeguards: development of organizational policies and procedures around access to and sharing of information, data storage and destruction • Technical safeguards: computer passwords, firewalls, data encryption • Reporting data breaches or failures to participants • Aggregate data when appropriate	☐

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- Assign unique IDs to data or using pseudonyms
- Remove identifying information from qualitative data

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4. Safeguard fair and equitable treatment

It is important that we are fair and equitable when evaluation teams decide about who to include in an evaluation. We want to make sure that we have a wide representation of people, groups and demographics in an evaluation.

Here are the procedures that should be implemented:

- Unless an evaluation question is focused on a particular group (i.e. gay men or young Indigenous people) you must make an effort to include people of various backgrounds, ages and genders in your evaluation
- If you are selecting participants on a certain criteria, you need to be transparent about this decision and it needs to be stated in the invitation to participate

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5. Consider conflicts of interest

"A conflict of interest may arrive when activities or situations place an individual or institution in a real, potential or perceived conflict between the duties or responsibilities related to research, and personal, institutional or other interests" TCPS.

Relationships needs to be examined carefully to identify and acknowledged and evaluation teams must work to overcome any perceived or real conflicts of interest in an evaluation project.

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6. Considerations for participatory and culturally safe evaluations

When engaging in participatory evaluation have you engaged peers, people with lived experience, or the people who will be impacted by the program or evaluation in all levels of your evaluation? Has the evaluation considered culture? And is it culturally safe for participants?

Here are some principles to consider:

- Greater or Meaningful Involvement of People Living with HIV / AIDS (GIPA/MIPA)
- individual and community empowerment
- Indigenous Approaches to Program Evaluation (National Collaborating Centre for Aboriginal Health)

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Adapted from:
COCQ-SIDA: Politique de la conduite responsable de la recherche, http://cocqsida.com/assets/files/2.dossiers/Recherche/2.3-Politique-sur-la-conduite-responsable-de-la-recherche-COCQ-SIDA.pdf
Let's Get Ethical! Ethical Considerations in Program Evaluation: http://www.excellenceforchildandyouth.ca/let-s-get-ethical-ethical-considerations-program-evaluation

WORKSHEET: WORK PLAN

Planning for the conduction of an evaluation should incorporate project management practices. Developing a clear work plan with realistic timeframes is key for ensuring the evaluation remains on-track to achieve its intended results.

The 'evaluation work plan' is a key project management tool that is commonly used by evaluators to ensure all activities are carried out within specified budgets and timeframes. A worksheet has been provided for you to create a work plan for your evaluation project (see Table 6). Starting in the left hand column of the work plan, list the all of the evaluation activities, estimate the number of hours they will take to complete (if you have multiple people working on the evaluation it might be helpful to think through how many hours/person/activity), and roughly when they will be completed. Note that it is important to gather input from evaluation stakeholders to ensure the proposed timelines are realistic and meet their expectations. Use the ***REACH Evaluation Checklist*** (above) as a way to think through all of the activities to include in the work plan. Click here to check out more resources on the REACH Evaluation Toolkit.

Table 6. Work plan worksheet

Evaluation Activities	**Hours**	**Timeframe (GANTT CHART)**											
(*E.g. stakeholder engagement, evaluation design, data collection & analysis, reporting, communicating findings, etc.)*	(*How long will it take you to complete this activity? If there is more than one person working on the evaluation who is doing what?*)	J	F	M	A	M	J	J	A	S	O	N	D
TOTAL													

WORKSHEET: CREATING AN EVALUATION BUDGET

Planning for the conduction of an evaluation should incorporate the project management practice of creating a budget to ensure the evaluation remains within its intended financial scope. We have provided you with a straightforward worksheet that will help you to create a budget for your evaluation project (see Table 7). The left hand column lists cost categories commonly encountered in evaluations: staffing, materials and supplies, equipment, travel, honoraria and incentives, and sharing findings. Given that REACH is doing much of its work using a participatory evaluation lens and that we will be engaging peers (people with lived experience with HIV and/or HCV) as peer evaluators and for data collection it is important to think through honoraria to compensate people for the time and expertise they are contributing to the evaluation. The Pacific AIDS Network has developed a useful tip sheet on peer compensation for your reference.

Once you have generally identified the costs associated with your project, provide brief descriptions of the costs involved and the funding allocated to each category. Note that if you are working as an external evaluator, you will likely need to create more detailed budgets that specify the amount of time (you can use your work plan to help calculate this) and money that will be spent on each evaluation activity. Click here to check out more resources on the REACH Evaluation Toolkit.

Table 7. Evaluation budget worksheet

Evaluation cost categories	**Description**	**Amount budgeted ($)**
Staffing (*external or internal evaluator, support staff, peer evaluators, etc.*) *[don't forget related benefit costs or GST costs if you are an independent consultant]*		
Materials and supplies (*e.g. telephone/teleconference lines, meeting costs, etc.*)		
Equipment (*e.g. online survey platform account, data analysis software, audio-recorder, computer, etc.*)		
Travel (*e.g. for meetings, consultations, conferences, etc.*)		
Honoraria and incentives (*e.g. honoraria for peer researchers, for peers who are completing data*		

collection tools, incentives to participate in online surveys, etc.)		
Sharing findings (*e.g. graphic design for reports, printing reports, webinars, conferences, etc.)*		
TOTAL COST:		

WORKSHEET: RISK MANAGEMENT STRATEGIES

Planning for an evaluation should incorporate the project management practice of conducting a risk management exercises in order to prevent harm from occurring. It is helpful to think at the beginning of an evaluation about identifying potential limitations, challenges and risks and then about potential mitigation strategies. Your stakeholders will be able to support your work in this area and once identified will be able to help you navigate around these potential challenges.

We have provided you with a worksheet that will help you to brainstorm strategies to address potential risks associated with carrying out your evaluation project (see Table 8). To use this worksheet, begin by listing potential risks associated with the evaluation and then brainstorm potential strategies that could be implemented to minimize those risks. This exercise could help you to identify risks in advance and then prevent them from occurring. It is also suggested that this worksheet is populated with a group or team and is revisited throughout the evaluation project for adjustments – it is a living document to be revised as you go.

Table 8. Risk management worksheet
Date last reviewed/revised:

Risk	Mitigation Strategy
1.	1.
2.	2.
3.	3.

WORKSHEET: CREATING A COMMUNICATIONS PLAN

Once evaluation findings have been written up into some form of report, it is critical to ensure that results and recommendations are shared with key stakeholder groups. Effective communication strategies can facilitate learning among stakeholders and to ensure the information gathered through the evaluation is used to inform program improvements and guide policy.

Given that there are a number of things to consider when sharing evaluation findings, it can be useful to create a 'communications plan', which outlines a set of strategies you intend to use to communicate findings with key audiences. A communications plan template has been provided for you in Table 9 below and should be developed with key stakeholders in the evaluation. Filling in each category across the table will help to ensure that:

- specific messages are shared with the correct stakeholders at the right time
- relevant communication methods are used for different stakeholder groups
- resources needed to communicate to key audiences are in place
- a timeframe for sharing key messages is established

Table 9. Basic communications plan template

Audience (*Who do you need to share evaluation findings with?)*	**Content** (*What key findings do you want to share with this audience? What is the main message?*)	**Format/Media** (*What is the best format to share findings? One-page summary report? Presentation? What will catch and keep their attention?*)	**Timing** (*When should this audience learn about evaluation findings? When are key decisions being made?*)	**Resources** (*What financial and human resources are required for this communication strategy?)*	**Responsibility** *(Who will lead the communication effort? Will it be the project leads, peers, evaluator?)*
1.					
2.					

Adapted from:

- Preskill, H. (2006). Communicating and Reporting Evaluation Processes and Findings. Presentation at the AEA/CDC Summer Evaluation Institute.
- The Pell Institute for the Study of Opportunity in Higher Education, The Institute for Higher Education Policy, & Pathways to College Network. (2015). The Evaluation Toolkit. Retrieved from: http://toolkit.pellinstitute.org/evaluation-guide/communicate-improve/create-a-template/

WORKSHEET: MOVING RECOMMENDATIONS INTO ACTION

You have come to the end of your evaluation. Yay! Give yourselves a pat on the back.

But wait, your work is not done yet. The evaluation has given your organization a lot of great recommendations on how to do your work better and how to improve services for your clients or the people you work with. Now it is time to think about the best way to move your evaluation recommendations into action.

The Moving Recommendations into Action – Overall Summary template has been provided for you in Table 10 below and should be developed with key stakeholders and leadership within your organization. Filling in each category across the table will help to ensure that:

- There is a commitment from everyone in the organization to read and support the recommendations in the evaluation and to find ways to move them forward to improve programs or services
- The organization has identified an individual or group (i.e. Board of Directors) who is responsible for overseeing progress relating to the evaluation recommendations
- Everyone is on the same page about the steps needed to move the recommendations into action, who is going to lead each step, how they are going to be evaluated or reported on and a timeframe for the work

We have also provided you with an ongoing reporting tool in Table 11 below to support the ongoing monitoring of progress relating to the evaluation recommendations.

Table 10. Moving Recommendations into Action – Overall Summary

Evaluation Recommendation	**Action Items**	**Partners**	**Responsibility**	**Report**	**Timeframe**	**Oversight**
(*What were the major recommendations that came out of the evaluation? Do these recommendations make sense to key stakeholders?*)	(*What are the steps that you need to accomplish or reach the recommend-dation?)*	*(Who are the people or organizations that you need to engage and build partnerships with in order to implement the recommend-dations?)*	(*Who is responsible for each action item? Is this one person or a team/group?*)	(*How are you providing regular updates? Are providing a narrative? Using ongoing monitoring data/ indicators?*	(*How often will action items be reported on?)*	(*Who is responsible for overseeing the action items and recommend ations? Who will be receiving the ongoing reports?)*

1.	a) b) c)					

Table 11. Moving Recommendations into Action – Ongoing Reporting

Action Items (*What are the steps that you need to accomplish or reach the recommendation?)*	**Responsibility** (*Who is providing the report?)*	**Report** (*Please provide an update based on the agreed upon reporting mechanism – see Table 1 - Overall Summary table)*	**Status** (*Has the action item been completed? In progress? Not started? Are you using a green light/yellow light/ red light system?)*
RECOMMENDATION – No. 1			
1)			
2)			
3)			
RECOMMENDATION – No. 2			
1)			
2)			