KnowHow
Learning Resources for the KnowFife Partnership Hub

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Planning an Evaluation

The success of any evaluation is grounded in good planning. This guide takes you through what you need to think about when you are thinking about undertaking an evaluation. It includes a useful checklist for planning an evaluation.

What is evaluation?

Evaluation helps you to learn from your day to day work. It assesses the effectiveness of your activities in a given area of work. It can be used by a group of people or individuals working alone.

Why do evaluation?

Although evaluation may seem like an additional task if you are short of time and resources it can save you time and resources by keeping you focused on and working towards the ultimate goal of a project.

Some reasons for doing evaluation are to:

- Provide accountability to those that fund your work / project / programme
- Demonstrate that you have used your resources – time and money - wisely
- Assess whether you are on track to deliver what you set out to do or if you are heading in a different direction
- Check that what you are doing is still what people want or need
- Identify what works, and celebrate successes.
- Identify what does not work or where you can make improvements
- Reflect on what you have learned, and share it with stakeholders
- Give you a good basis for future planning

What do you need to think about in planning an evaluation?

There are a number of different areas to think about, and within that, questions to ask yourself, that can help you develop an evaluation plan.

Establishing the aims of the evaluation

Start by being clear about the purpose of the evaluation, who your stakeholders are, and the benefits you expect from the evaluation.

Gathering information about the intervention

Be clear about you want to evaluate and what it is expected to achieve. Consider if there have been any previous evaluations of this or similar initiatives.

Formulating the key evaluation questions

Under the main objectives of the evaluation, consider the questions that you want the evaluation to be able to answer.

Developing the evaluation design

Consider where you will get the evidence for the evaluation. This will generally be one of two types: 1) descriptive information about the intervention or 2) evaluative data that you specifically collect. Outline what you will need to collect, how you will collect it and when, and think ahead to what you will do with what you collect.

Identifying project resources

Think about the resources that you will need to support the evaluation.

Reviewing the organisational context

It is important to take stock of the current situation and understand what is happening in the organisation and how this might impact on the evaluation.

Communicating about the evaluation

Make sure you have a clear communication strategy in relation to the evaluation.

Reflecting on practice

The final part of any evaluation is to reflect on what you have learned and use that to inform or improve implementation, work planning or a future evaluation.

Planning an evaluation - checklist

Establishing the aims of the evaluation	
1. What is the purpose of the evaluation?	
2. Who are the stakeholders for this evaluation?	
3. What are the key benefits of the evaluation?	
4. Who will receive the evaluation results? In what format? By when?	

Gathering information about the intervention	
5. Which intervention is being evaluated and why?	
6. What is the expected impact or anticipated change as a result of the intervention?	
7. Is the intervention well established or is it new? Will this influence its impact?	
8. Has an evaluation of this type been implemented before? If yes, are there any factors that might influence the success of the evaluation?	

Formulating the key evaluation questions

9. **What are key questions that the evaluation must answer?**	

Developing the evaluation design

10. **When will you collect information or data – before, during and/or after?**	
11. **What form will your data collection take – surveys, interviews, focus groups?**	
12. **Do you have the skills to design an appropriate data collection method?**	
13. **Will you need to pilot the evaluation design?**	
14. **Who will you collect evaluation from – population or sample?**	
15. **How will you deal with the evaluation data that has been collected?**	

Identifying the project resources

16. Who will oversee / carry out the evaluation?	
17. How much time is needed to collect the evaluation data?	
18. What support is needed to make the evaluation work?	
19. What is the budget to support the evaluation?	

Reviewing the organisational context

20. Is anything happening around the organization that might influence the success of the intervention and/or the evaluation?	

Communicating about the evaluation

21. Have you established a communication strategy for the evaluation?	

Reflecting on practice

22. Looking back, what can be learned about the evaluation that can help to inform future evaluations, this intervention, other interventions, continuous development?	

Credit: NHS Employers, 2014

Summary

The checklist above provides a very practical starting point for planning an evaluation.

These questions will help you to consider the aims of the evaluation, what information you will need to gather, what the key questions are, the evidence you will need to collect, and the resources you will need to deliver a successful evaluation.

Useful Links and Resources

Better Evaluation

https://www.betterevaluation.org/

Better Evaluation Rainbow Framework

https://www.betterevaluation.org/en/rainbow_framework

Evaluation Support Scotland – Resources for the Evaluation Pathway

http://www.evaluationsupportscotland.org.uk/evaluation-landing-page/evaluation/

Joseph Rowntree Foundation (2005) *Evaluating community projects A practical guide* *https://www.jrf.org.uk/report/evaluating-community-projects-practical-guide*

'Planning an evaluation – checklist' courtesy of NHS Employers (2014) *Evaluating health and well-being interventions for healthcare staff: Key Findings* https://www.nhsemployers.org/-/media/Employers/Publications/Evaluating-health-wellbeing-interventions-for-healthcare-staff-2.pdf?dl=1&dl=1