

# Key Evaluation Tasks

Common tasks that must be completed in a typical evaluation



## Plan and Manage

- Evaluation team:* Assemble an evaluation team and determine roles.
- Evaluation plan:* Prepare an evaluation plan that includes both managerial and technical tasks.
- Evaluation budget:* Develop an evaluation budget.
- Formal agreements:* Prepare document(s) that define the evaluator's scope of work and conditions for compensation.



## Engage Stakeholders

- Key stakeholders:* Identify stakeholders who should be involved in planning, conducting, or using the evaluation.
- Stakeholder engagement:* Determine the appropriate level of and means for involving and communicating with stakeholders.
- Stakeholder preferences:* Identify stakeholder preferences for types of evidence or evaluation approaches.



## Contextualize

- Purpose:* Identify the evaluation's purpose and intended uses.
- Information needs:* Identify the specific information needs of the evaluation's intended users.
- Program description:* Identify key aspects of the program, including resources, activities, intended beneficiaries and their needs, and expected results.
- Contextual factors:* Identify contextual factors that are likely to influence the program, its outcomes, or the evaluation.



## Design

- Questions or criteria:* Determine the specific evaluation questions and/or criteria.
- Safeguards:* Identify potential negative consequences of the evaluation and establish appropriate safeguards.
- Indicators:* Identify what will be measured to address the evaluation questions and/or criteria.
- Methods and sources:* Determine what contextually appropriate methods and data sources will be used.
- Comparison groups:* Determine if comparison or control groups are appropriate and feasible.
- Sampling:* Determine what, if any, sampling techniques should be used; determine sampling frame and protocol as needed.



## Collect and Analyze Data

- Data security:* Establish and follow protocols for ensuring security of collected data.
- Instruments:* Develop (or obtain) and test data collection instruments and protocols.
- Data collection:* Collect data in a contextually responsive and technically sound manner.
- Validity:* Assess the soundness of the data and prepare data for analysis.
- Analysis:* Analyze data in a contextually responsive and technically sound manner.



## Interpret Evidence

- Comparisons:* Identify appropriate points of comparison, benchmarks, or values for interpreting evidence.
- Interpretation:* Integrate and interpret results systematically to reach conclusions in relation to evaluation questions and/or criteria.
- Alternative explanations:* Investigate alternative explanations for observed results.
- Recommendations:* As appropriate, develop recommendations, based on evidence.



## Communicate and Use Results

- Format:* Determine the appropriate format and means for communicating the evaluation results.
- Content:* Determine what content to include in each reporting medium, based on the intended audience.
- Presentations:* Prepare evaluation report(s) with attention to visual elements and formatting to support understanding of evaluation results.
- Dissemination:* Disseminate reports (or other media) to appropriate audiences.
- Support:* Follow up with stakeholders to support understanding and use of results.



## Evaluate the Evaluation

- Documentation:* Record key decisions throughout the evaluation for accountability purposes.
- Feedback:* Seek/provide feedback on the quality of the evaluation.

# EvaluATE Resources

EvaluATE's collection of resources to are designed to support ATE project evaluators and project staff in carrying out various evaluation tasks. Resources include checklists, guides, templates, webinars, and blogposts. All materials are available from [www.evalu-ate.org](http://www.evalu-ate.org).



## Plan and Manage

- Guide to Finding and Selecting an Evaluator ([bit.ly/finding-evaluator](http://bit.ly/finding-evaluator))
- ATE Central's Evaluator Map ([atecentral.net/evaluators](http://atecentral.net/evaluators))
- American Evaluation Association's Evaluator Directory ([bit.ly/aea-dir](http://bit.ly/aea-dir))
- Evaluator Biosketch Template for NSF Proposals ([bit.ly/eval-biosketch](http://bit.ly/eval-biosketch))
- Evaluation Planning Checklist for NSF-ATE Proposals ([bit.ly/checklist-evalplan](http://bit.ly/checklist-evalplan))
- ATE Proposal Evaluation Plan Template ([bit.ly/eval-plan](http://bit.ly/eval-plan))
- Results from Prior NSF Support Checklist ([bit.ly/nsf-ps-check](http://bit.ly/nsf-ps-check))
- Principal Investigator "To-Do" Checklist ([bit.ly/finding-pichecklist](http://bit.ly/finding-pichecklist))



## Engage Stakeholders

- Communication Plan Checklist for ATE PIs and Evaluators ([bit.ly/checklist-commplan](http://bit.ly/checklist-commplan))
- Identifying and Involving Stakeholders in an Evaluation (<http://bit.ly/stakeholder-wrk>)



## Contextualize

- Logic Model Template for ATE Projects and Centers ([bit.ly/ate-logic](http://bit.ly/ate-logic))



## Design

- Checklist for Identifying High-Performing Indicators ([bit.ly/indicator-eval](http://bit.ly/indicator-eval))
- Data Collection Planning Matrix ([bit.ly/data-matrix](http://bit.ly/data-matrix))



## Collect and Analyze Data

- The Retrospective Pretest Method for Evaluating Training [webinar] ([bit.ly/retropre-handout](http://bit.ly/retropre-handout))
- Developing Questions for Effective Surveys [webinar] ([bit.ly/surveyquestions-handout](http://bit.ly/surveyquestions-handout))
- Six Data Cleaning Checks ([bit.ly/hubbardaug2016](http://bit.ly/hubbardaug2016))
- LGBT-Inclusive Language in Data Collection ([bit.ly/hsumay15](http://bit.ly/hsumay15))



## Communicate and Use Results

- Program Evaluation Report Content Checklist ([bit.ly/report-checklist](http://bit.ly/report-checklist))
- Creating One-Page Reports ([bit.ly/eval-onepagereports](http://bit.ly/eval-onepagereports))
- Evaluation Recommendations ([bit.ly/rec-tips](http://bit.ly/rec-tips))
- Questions, Data, Conclusions, Recommendations [webinar] ([bit.ly/effectiveeval-handout](http://bit.ly/effectiveeval-handout))
- ATE Evaluation Report Repository ([bit.ly/ate-eval-reports](http://bit.ly/ate-eval-reports))