Evaluation Plan Templates

The following worksheets are designed to serve as a guide for cataloging and organizing the elements (data, resources, needs) for developing your measurement and evaluation roadmap to support your initiative. The evaluation framework consists of three parts: Structure, Process, and Outcomes.

Structure

The purpose is to assess the gaps and needs at the community level by taking an inventory of what currently exists. Then make or update your strategic plan. Ask yourself these questions and fill out the worksheet with your answers.

- What are the community's needs and interests? Think about current health risks, current use of services/ resources, and disparities.
- Are effective evidence-based programs, policies, and environmental supports in place for improving or maintaining the health and well-being of the community?
- What resources exist in the community that may impact opportunities, success, and sustainability of initiatives? Which are currently being used?
- Who are all the stakeholders? Who is at the table and who is not? Who should be brought to the table?

Structure Evaluation		
What we know/have:	What we need/want:	What can we obtain/do now vs. planning for mid- and long-term steps?

Process

The purpose of process evaluation is to monitor program implementation. This includes an assessment of program quality, program completion, extent of participation, and reach. Use this worksheet to map out how you plan to measure each process element. This includes planning out *when* (e.g., six months after launch), *how often* (e.g., semi-annually), and *how* (e.g., by survey) to collect the data.

Process Evaluation		
Quality and Completion	Extent of Participation	Reach
To what degree are the initiatives being implemented as planned?	To what degree are the target community members aware of, engaged in, and satisfied with the initiatives?	What is the participation or completion rate for each of the initiative elements?
When:	When:	When:
How often:	How often:	How often:
How:	How:	How:

Outcomes

Outcomes evaluation addresses the impact question. Did your initiative hit its targeted goals? Use the following worksheet to define the short-, mid-, and long-term targeted goals. Be as specific as possible.

Outcomes Evaluation			
Period	Metrics	Indicator Definition	Target Goal
E.g., Short-term (1-2 years)	Employment	Percentage of adult residents who are employed	Increase the percentage of adult employment in our community by 3% per year
Short-term (1-2 years)			
Mid-term (3-5 years)			
Long-term (6-10 years)			