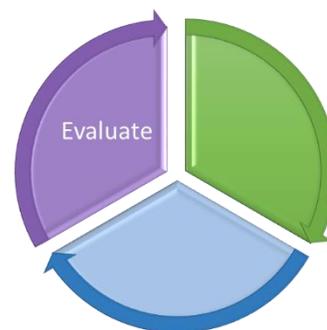


# PREPARE TO EVALUATE

## Purpose:

The purpose of this stage is to help identify the key evaluation questions, and build the **Evaluation Plan** and **Work Plan** to carryout the proposed evaluation.



## Step 1: Build the Evaluation Plan

In this step, with the core stakeholders, complete the **Evaluation Plan**. Engaging the core stakeholders will ensure the evaluation is relevant and meets their needs. The evaluation plan will help to ensure the right questions are being asked to address the evaluation needs and improve the program. The evaluation plan outlines the evaluation questions, indicators, and plans for data collection and analysis.

### *Step 1a: Identify the evaluation purpose, and questions*

If you began with the *Focus the Evaluation* stage guide, the type of evaluation, its purpose, and key evaluation questions have been identified. You can review them to ensure they are still relevant and document the information in the **Evaluation Plan**. Please refer to the *Focus the Evaluation* stage guide for more information regarding how to identify the type of evaluation, evaluation purpose, and how to ask clear evaluation questions. The rationale to explain why the evaluation questions are being asked will be within the Evaluation Plan as well.

### *Step 1b: Determine the type of data to collect*

Outline what measures/indicators you are looking for and identify if the measures are qualitative or quantitative. To do this, refer to the *Establish Key Indicators* stage guide.

### *Step 1c: Identify the data source(s) and the data collection tool(s) required*

In this step, you will identify if existing data are available using the **Population Health Assessment and Surveillance** tool. If new data needs to be collected, use the **New Data Collection** tool to plan and organize the information. Examples of data collection methods include individual interviews, focus groups, photo-voice, participatory action research, questionnaires, and observation.

## TOOLS

- *Evaluation Plan*
- *Work Plan*
- *Population Health Assessment and Surveillance tool*
- *New Data Collection tool*

### *Tip*

*If a **Logic Model** and/or **Program Description** has been developed, they can be help to build the **Evaluation Plan**.*

### *Tip*

*Be sure to involve core stakeholders in the development of your data collection tool(s) to ensure appropriate language is used along with relevant questions.*

Different evaluation questions may require the use of different data collection tools. For example, if you are doing a mixed method approach, you might use a questionnaire and focus group as your data collection methods. Once the data collection tool(s) has been identified, you will need to develop and then pilot the tool(s). Pilot testing allows you to have a “dry-run” of the tool(s) to ensure meaningful data is being collected. The pilot test will help to determine if the respondents understand the questions; recognize if the questions are yielding the information you are seeing; and ensure the information is displayed correctly.

### ***Step 1c: Identify who will collect the data and when the data will be collected***

In this step, the information about who will collect the data and the timeline of data collection can be further outlined in the **Work Plan**. When outlining who will collect the data and how it will be collected, try to be as specific as possible. For example, if Public Health Nurses are collecting the data, specifically identify the name of who is collecting the data and the specific day/time they are collecting the data.

### ***Step 1d: Identify who will analyze the data***

Using the **Work Plan**, the process of analyzing the data can be documented, including the analysis timelines and who will be assigned to analyze the data. The type of data analysis required is dependent on the data collection method(s) and source(s) used. Who, when and how will the results be analyzed? If qualitative and quantitative data is being collected, plan how each type will be analyzed. Depending on the type of data being collected, connect with the appropriate support staff, (i.e., Program Evaluator, Data Analyst and/or Epidemiologist) about the analysis methods.

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## **Guiding Questions**

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Who will be making decisions based on evaluation findings?  
Who will the target audience for the evaluation results be?

### ***Prepare to Evaluate Checklist***

Items relevant to staff are white with a dotted border | Items relevant to the Program Manager are grey with a solid border

<input type="checkbox"/>	<b>Build the Evaluation Plan</b>
<input type="checkbox"/>	Engage stakeholders in the building of the evaluation plan
<input type="checkbox"/>	Determine the purpose and type of evaluation
<input type="checkbox"/>	Determine the type of data to collect
<input type="checkbox"/>	Identify the data sources and data collection tools required
<input type="checkbox"/>	Identify who will collect the data
<input type="checkbox"/>	Identify who will analyze the data
<input type="checkbox"/>	Review and approve evaluation plan
<input type="checkbox"/>	Determine whether proceeding with the evaluation or if more information is required before starting the evaluation