Evaluation Planning Tips

Consider using a **planning** & **reporting template** to map out and organize the following key components of an Evaluation Plan.

The content for this plan can be taken from the Template for Goals & Objectives in your grant proposal. Using this outline, that information can be repositioned and sharpened into finer definition.

Program Objectives	Program service Recipients	Measurable Performance Indicators (PIs)	Data Collection Methods & Instruments	Analysis Plan
Intended results of the program activities provided to serve participants. *Program activities are designed to meet participant needs and match their interests.	For each activity, describe the **activity participants**/ populations intended to receive the programming by key identifiers. ▸ Students: in what grades, at which sites, with what types/levels of performance or need, *etc*. ▸ Parents/Adult Learners	Each Objective is associated with one or more measurable PIs that collectively indicate whether the Objective was met. PIs are written to meet **SMART Criteria**: ◢ Specific: targets a clearly defined area of improvement for a specific target group. ◢ Measurable: states a defined outcome that can be assessed, and how it is to be assessed, including instruments and analyses (can include qualitative assessment) ◢ Achievable: realistic given baseline conditions and available resources ◢ Relevant: aligned to program mission, program activities, school day academics, GPRA indicators [*Note that PIs are not *required* to be aligned with GPRA indicators] ◢ Time-bound: specifies when the goal will be achieved.	Valid, reliable means used to assess PIs: Surveys, interviews, observations, focus groups, report cards, attendance rosters, behavior/ disciplinary records, state assessments, other skills assessments, *etc*. *Consider strategies to generate robust response rates; rates below 50% are not considered meaningful assessments of the PI.	Outlining the approach for analyzing the collected data used to determine whether, and to what degree, the specified PI is achieved.

Additional Reference

Round 7 Year 5 **AER Template** (linked HERE)

During the final year of the prior funding round, this template was used to provide a standard structure for a the **Annual Evaluation Reports** prepared by Local Evaluators that were submitted to NYSED and the Statewide Evaluator. It was developed by the Statewide Evaluator as an initiative of the NYSED Program Office to study (a) the factors and trends appearing in evaluation activities and reporting practices, and (b) the achievement of program-identified outcomes across the state.

While the evaluation reporting process for the current Round 8 local evaluators is being re-examined, last year's form can still be **useful as a resource** to support effective, research-informed evaluation and report planning. Specific guidance for developing **Logic Models and Theories of Change** can be explored, starting on page 25.