PLANNING USEFUL EVALUATION SYSTEMS

- WORKSHEETS -

John A. McLaughlin, Ed.D.
School of Education
College of William and Mary
Macgroupx@aol.com
757-869-1004

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EVALUATION PLANNING WORKSHEETS

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INTRODUCTION

The following worksheets are keyed to the stages involved in planning the evaluation displayed in *Figure 1*. They have been prepared to assist the local team in conceptualizing and planning their evaluation of the local special education program so that it will have the highest probability of meeting the information needs of decision makers associated with the program.

Users of the worksheets are encouraged to conduct a quick review of the steps in the model to determine where the planning process should be started. Some users will have a pretty good idea of the evaluation questions to be addressed in the intended study. If so, go right to *Worksheet VII*. Others may be just starting the evaluation planning process and may not know what aspect of their program is to be addressed in the evaluation. In this case, it may be useful to start with *Worksheet III*. Simply put, it is best to make the process and attendant worksheets pay off for you. Start at the place that meets your needs. *Worksheet I* is presented as a vehicle to assist users in keeping track of their progress through the planning process. Review of *Worksheet I* at this time will orient the user to all the steps to completing the evaluation plan.

As with any adventure, plans have to be made. *Worksheets II through V* are designed to help you get started in the evaluation planning process. The first step is to identify the people who are going to be responsible for the design, conduct and report of the evaluation. We believe that this team should be comprised of people who know about the evaluation planning process and those who are knowledgeable of the program to be measured. If this composition is accomplished, then the team members can inform each other and share leadership and decision making responsibilities throughout the evaluation planning process. The team, as well as the plan, must be sanctioned by the top administration. *Worksheet II* will help planners identify possible skills needed in the evaluation enterprise. Remember, the team composition can be changed.

After the team is identified, and initial focusing of the evaluation takes place. The point of this step is to identify which components[1] of the program will be measured. *Worksheet III* will help the team organize this effort. If the team does not have a good grasp of the program to be measured, then they should go to the Program Description (*Worksheet VI) activities and then return to Focusing.*

Evaluation utilization will be enhanced if the people who have an interest or stake in the evaluation are involved throughout the design, conducting, and reporting of the evaluation. *Worksheets IV* will help the team identify these people and the roles to be played in the planning process. New people may have to be added as the evaluation process emerges.

The final step in getting started is the specification of the purposes of the evaluation effort.

Why are you conducting the measurement? What are the probable uses to be served by the measurement? It is conceivable to plan a evaluation without some specific uses in mind. These must be set forth at the start of the evaluation planning process. The purpose statements communicate the expected benefits of the evaluation.

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[1] *The term components is used throughout the worksheets to represent elements of the program—a set of program activities that are grouped together.*

Describing the program to be measured is the next step in the process. These activities will serve two purposes in the planning process. First, the team will become aware of all salient features of the program; its major components and their outcomes (objectives), processes (activities), and required inputs (resources) as well as the interrelationships which may exist between components. Second, the Program Description will establish the STANDARDS upon which judgments will be made. The Program Description will be written as the best estimate of what is needed to meet the needs of the clients. The outcome, process, and input statements will reflect what is expected or required about the program. These are standards. The evaluation is conducted to determine if these standards exist in reality.

After completing the Program Description, the team should return to *Worksheet V*. Are the purpose statements comprehensive? Are revisions necessary? Should the team add new purpose statements or delete one or more of the original statements?

Now the team is ready to plan the actual evaluation. A firm foundation for the planning has been established. The team knows the potential uses of the evaluation and more importantly, will be able to "ground" these in the program to be measured by referencing the evaluation activities back to the Program Description.

Specifying the evaluation questions are known, then the information collection strategies may be designed or selected. Information should come from as many sources as possible (parents, clients, teachers, administrators, etc.). Multiple formats should be used (observation, interview, surveys, etc.). *Worksheet VIII* will assist the team in developing an Information Collection Plan. Planning should include field-testing for all information collection strategies.

The information generated by the evaluation will have to be analyzed. It will have to be cleaned, stored, and reduced to a manageable level. Judgments will be based on these analyses. It is recommended that the analysis procedures be tested using information gathered in the field-test of information collection strategies.

Reporting the evaluation findings is of paramount importance. Reports should occur throughout the evaluation planning and implementation. They should be both formal and informal and the team should consider multiple formats for the delivery of reports. Finally, it is critical for the team to remember that the reports will be received in a political context. Be aware of the potential problems which might arise within and across stakeholder groups with regard to evaluation findings. Involving stakeholders throughout the process will help identify these concerns and possibly reduce their impact on the evaluation and its use. Completing *Worksheet X* will assist the team in conceptualizing the reporting needs of the evaluation. Now all the pieces are in place to begin the evaluation. The team will quickly realize the proposed evaluation is complex. Because of this, a Management Plan must be developed. Keyed to the evaluation questions, the Management Plan enables the team to specify who does what, when. *Worksheet XI* is designed to help the team develop the Management Plan for the evaluation.

The evaluation, regardless of its complexity, will require time and resources. As such, a Budget must be developed for the proposed evaluation. *Worksheet XII* is designed for this purpose.

Finally, as noted above, the evaluation will serve many purposes. Because it will require the allocation of program resources, people (the team and various stakeholders) will be interested in the degree to which these purposes are served. Therefore, a Meta-Evaluation of evaluation Plan must be developed. *Worksheets XIII* has been developed to help the team consider these questions. It is important to track evaluation uses/benefits from the start of the planning process and throughout the conducting of the evaluation; therefore, a Tracking Form is included as *Worksheet XV*. Finally, we recommend that the team conduct a Force Field Analysis (*Worksheet XIV*) of the proposed evaluation after the planning is completed. This allows the team to identify forces for and against the successful implementation of the evaluation prior to its implementation. Necessary revisions can be made in the plan to overcome some potential barriers.

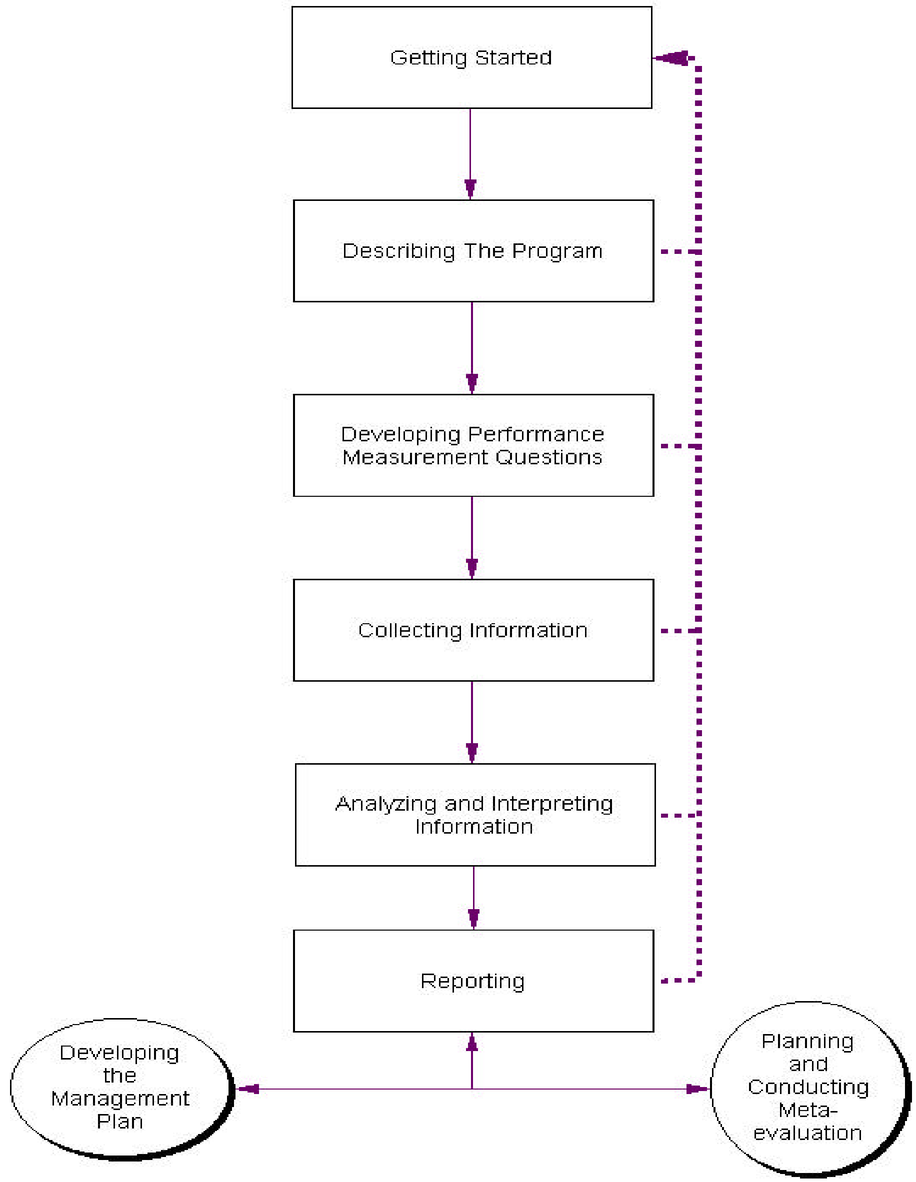
The worksheets take the team through the steps necessary to think through the evaluation. A description of the evaluation functions served precedes each *Worksheet*.

After completing all the *Worksheets*, the team should have:

- Specified who will be needed to design, conduct, manage, and report the evaluation
- Identified what it is about the program that will be addressed in the evaluation
- Identified salient evaluation questions keyed to the aspects of the program that will be evaluated,
- Determined appropriate information gathering and analysis techniques,
- Established necessary timelines for all phases of the evaluation (e.g., data gathering, analysis, reporting),
- Developed a budget for the evaluation,
- Planned a meta-evaluation evaluation to track the worthiness of the evaluation in terms of potential uses.

It is important to remember that as team progresses through evaluation planning; each stage is interrelated with other stages and thus influences the design of each. Therefore, while there is a logical linear relationship between the stages, that is, what is accomplished in stage one will dictate what is planned in stage two, any changes in thinking in a subsequent stage will impact on what was planned for previous stages. For example, if the team decides to add a qualitative component to the Information Collection Plan, then they will have to return to the Team Member Skill Worksheet to determine if that skill is present in the team. If not, it may be necessary to employ additional staff. The team must remain flexible and open to changes as the evaluation plan evolves. Finally, the team should not feel constrained by the worksheets. If any one or more do not meet the needs of the team, don't use them! If the order appears illogical given the make up of the team or its charge, change the order! For example, it may be more appropriate for the team to complete the Program Description Activity first and then move to Focusing.

FIGURE 1 -- STEPS IN PLANNING THE EVALUATION SYSTEM



WORKSHEET I -- PLANNING PROGRESS RECORD

Worksheet Name	Date Completed	Date Revised	Notes
II Team Member Skill			
III Focusing Matrix			
IV Stakeholder Involvement			
V Evalaution Purpose(s)			
VI Program Description			
VII Evaluation Questions			
VIII Information Collection Plan			
IX Data Analysis Plan			
X Report Generation Plan			
XI Evaluation Management Plan			
XII Evaluation Budget			
XIII Meta-Evaluation evaluation Plan			
XIV Force Field Analysis			
XV Utilization Tracking Form			

WORKSHEET II -- TEAM MEMBER SKILL CHECKLIST

Evaluation is a complex process requiring many varied skills and different knowledge bases. Some team members will have to know the program and the context in which it is implemented while others will have to be knowledgeable and skillful in the principles and practices of evaluation. It is unreasonable to expect that one team member will have all the knowledge and skills necessary to design, conduct, and report the evaluation.

It may be necessary to obtain the services of consultants outside of the program to assist the team in certain aspects of the evaluation (e.g., data collection and analysis). If this is the case, the team members must be able to clarify their needs for the consultant to be certain there is a match between their expectations and the approach to be used by the consultant.

The following worksheet should be completed after the team is appointed. List each team member's name at the top of the columns on the form and then check the skills) that the team member can contribute to the effort. It may be necessary to add team members when the form has been completed if required skills are not present. Additionally, it is likely that as the evaluation planning progresses, additional knowledge/skill will have to be represented in the team. Use additional sheets if there are more than five team members.

WORKSHEET II

TEAM MEMBER SKILL CHECKLIST
TEAM MEMBER NAMES(S)

Knowledge/Skill Base					
Program					
Content					
Policies/Procedures					
Administration					
Context					
Agency					
Community					
evaluation					
Group Process Techniques					
Interpersonal communication					
Program Design/Description					
Sampling					

(Continued on Next Page)

TEAM MEMBER SKILL CHECKLIST

TEAM MEMBER NAMES(S)

Instrument Design/Selection	
Survey	
Interviews	
Document Review	
Observation Schedules	
Tests	
Conducting Interviews	
Knowledge/Skill Base	
Analysis/Interpretation	
Data Storage	
Descriptive	
Correlational	
Qualitative	
Program Management	
Budgeting	
Reporting	
Writing	
Formatting	
Editing/Language	
Marketing	
Other (Please specify)	

WORKSHEET III --FOCUSING MATRIX

Early in the evaluation it is important to identify the program components that are probably going be the focus of the evaluation. This is a preliminary effort which likely will be modified after the Program Description stage of the process. The purpose of this activity is to orient the team to the needs of the evaluation to give them some direction.

After the team is formulated, they will begin interacting with stakeholders (*Worksheet IV*) and reviewing documents which address the program to be evaluated. These documents may include formal charges that have been given to the team regarding the purpose of the evaluation as well as
regulations which might indicate required targets of the evaluation and/or required evaluation strategies, timelines, and reports.

The team should review each program component (e.g., see Program Description Worksheet) and then rate the degree to which the evaluation of that component is needed. If the evaluation is required by regulation, policy or if decisions will be made immediately, then the evaluation would be essential. If the evaluation is not required, but decisions will be made in the near future about the component, then the evaluation would be judged as being necessary. If no judgments or decisions will be made about the component, then there is a limited need for its evaluation.

Worksheet III

Focusing Matrix

Program Component Name	Relative Need for evaluation			Comments
	Essential	Necessary	Limited	
1				
2				
3				
4				
5				
6				
7				

WORKSHEET IV -- STAKEHOLDER INVOLVEMENT

At the start of the evaluation, the team must identify persons who are interested in, or knowledgeable about, the program. These people are called "stakeholders". Stakeholders are those who:

- care about the program
- plan the program
- provide the program
- benefit from the program
- will provide data for the evaluation,
- will benefit or suffer from the evaluation
- will use the results

These individuals will interact with the team throughout the evaluation. They may provide information about the program; why it was established, the program objectives, activities used to achieve objectives, and standards which might be used to judge program merit. This information will be useful in the Program Description stage of the evaluation.

Stakeholders may also assist the team in deciding what aspects of the program should be evaluated. They may inform the team of the probable decisions which will be made about the program. Thus, the stakeholders may assist the team in focusing the evaluation.

Another function often played by Stakeholders is to help the team formulate evaluation questions and appropriate information gathering and reporting procedures. Thus, they can have significant input into the design of the evaluation.

Finally, Stakeholders may be used to evaluate the worthiness of the evaluation. They tray provide input to the team on the appropriateness of the evaluation Plan as well as the usefulness of the information generated through the implementation of the evaluation.

Several potential Stakeholder groups are represented on *Worksheet IV*. It is useful for the team members to not only identify the group which might be interested in the program or its evaluation, but also to note the stage of the evaluation in which the stakeholder group might participate. Some may participate in all stages. In fact, as stressed in the previous document, it is important to engage the Stakeholders, where appropriate and feasible, not only in the design of the evaluation but also throughout its implementation and reporting. Such continuous involvement will promote the use of the evaluation results.

WORKSHEET IV

STAKEHOLDER INVOLVEMENT PLAN
Evaluation Planning Function

STAKEHOLDER NAME	FOCUSING	PROGRAM DESCRIPTION	PERFORMANCE MEASUREMENT QUESTIONS	DATA PLAN	DATA ANALYIS	PLAN REPORT	BUDGET MANAGING	META-EVAL OF PERFORMANCE MEASURMENT

WORKSHEET V -- EVALUATION PURPOSE(S)

The outcome of the completion of the Focusing Matrix in *Worksheet III* is a preliminary understanding of which components of the program will be addressed by the evaluation team. The next step is to clarify the purpose(s) for evaluating the program components. Why will the component be measured? What use(s) will be made of the evaluation data? What decisions will be served?

To ensure that your purpose statements communicate clearly, make sure they have three parts:

1. An objective for the evaluation, e.g.:
    - to describe
    - to determine the extent to which
    - to determine which is more effective.

2. One or more intended uses of the evaluation information, e.g.:

    - program improvement,
    - policy development,
    - accountability,
    - public relations or persuasion, and/or
    - planning additional evaluation

3. One or more specific users of the evaluation information, e.g.:

    - staff, administration or policy makers,
    - Parents,
    - students
    - employers
    - public, and/or
    - others

For each selected program component, one or more of the following reasons for evaluating that component might be noted:

- "soft" data indicating success that should be documented,
- new research suggesting alternatives,
- complaints from consumers,
- desire to expand or replicate,
- desire to maintain/survive,
- impending budget cuts,
- staff concerns about doing better,
- "soft" data indicating potential problems,
- need for a better image,
- mandates and requirements,
- specific requests for information.
- administrator concerns about:
  - program design (the overall plan/structure of inputs, processes and outputs),
  - resources (facilities, equipment, personnel, material and other inputs),
  - activities (actual procedures used; the processes),
  - results (outputs and impact).

For each component selected for evaluation after reviewing the Focusing Matrix data, the team should write a purpose statement which indicates why it is important to evaluate the component and for what potential uses. Then the team may want to review all purpose statements and rank them in order of importance to the total evaluation effort.

WORKSHEET V

EVALUATION PURPOSES

PROGRAM COMPONENT NAME	PURPOSE STATEMENT	PRIORITY RANK

See Focus Matrix (*'Worksheet III* or Program Description (*Worksheet VI*)

WORKSHEET VI -- PROGRAM DESCRIPTION

One of the most common complaints heard from local program administrators relates to how to use evaluation information to make decisions. One reason for this problem is that not enough time was spent in the evaluation planning for describing the program to be measured. The program description serves two purposes. First, it enables the team to acquire an understanding of the program. Second, it allows the team to anchor the evaluation to specific program components.

The teams' task at this stage of the process is to first identify the major facets or components of the program to be measured. This is made less difficult if the team determines the major functions of the program and then aggregates similar functions into program components.

After each major function area or component is identified, it should be described in terms of its Inputs, Processes and Outputs (IPOs). What are the major goals or objectives for the components? What activities or strategies are used to accomplish these objectives? What resources (staff, time, finances, information, equipment, facilities, etc.) are required to implement the strategies?

Worksheet VI is presented to help you describe each program component in terms of its inputs, processes, and outcomes. It is not necessary to portray your project using this worksheet. You may find it easier to write paragraphs which describe the components. The first paragraph might describe the objectives (outputs) of the program. The second would communicate the activities (processes) that will be accomplished to achieve your objectives. The next paragraph would represent the resources (inputs) needed to conduct the activities. Sometimes we start with this textual representation of the program as a general statement of the program. We use it as a basis to identify the major components or facets of the program. Then for each of these we write IPO statements.

Before moving ahead, two observations about Program Description should be made. First, program components are often related. That is, outputs from one are used as inputs for another. For example, the output from the diagnostic function becomes a resource (input) for the planning and placement function. Thus, it is possible to network components to indicate relationships. When the success of one component depends on the success of another, this relationship should be addressed in the evaluation.

Second, the component description may be completed by level. The team may first describe IPOs for each component at a general level. Then, if the component is to be the focus of the evaluation, the team would describe it in more detail; being more specific for each IPO statement. This increased detail enables the team to clarify program standards. That is, these statements serve as the standards upon which the program will be measured. They represent reasonable expectations of the program in terms of its inputs, processes and outcomes.

Worksheet VI

Program Description

				Outcomes		
Resources & Partners	**Activities**	**Outputs**	**Customer Reached**	**Short Term**	**Intermediate Term**	**Long Term**

External Influences:

Worksheet VI

Program Description[2]
LEVEL 1 2 3 4

COMPONENT NAME:		
INPUT (RESOURCES)	PROCESSES (ACTIVITIES)	OUTPUTS (OBJECTIVES)

[2] This form should be completed for each component of the program that is being evaluated. The level reflects the level of specificity in the form. A level 1 description is more general while a Level 4 description is more specific. In describing the program, we usually start with more general description (Level 1) and move to higher levels of specificity as the measurement needs dictate.

WORKSHEET VII -- EVALUATION QUESTIONS

The evaluation questions serve as a bridge between the Program Description and the Information Collection Plan. The questions set the state for information collection by not only indicating the needed to answer the question. The purpose of the evaluation drives the team's selection of the questions. It is useful to review Worksheet V, evaluation Purposes, before starting this phase of the process.

One problem faced by program staff and evaluators is not knowing how to apply evaluation and evaluation findings to program decisions. This occurs because the questions driving the process were not anchored to a particular component or element of the program. Thus, it is important to identify the specific aspect of the program to which the questions relate at this stage of the evaluation planning. In column two of Worksheet VII there is space for the planners to indicate the design referent for the question. This refers the planner back to Worksheet VI, Program Description. The number of the component addressed by the question should be entered in this column. If you are using another method of program description, simply put some locator name here to reference the question back to the description.

As noted in the table on the next page, evaluation Foci, the evaluation questions should address all elements of the program's performance spectrum. This is particularly important if you are using a learning orientation aimed at continuous program improvement. You simply should not make decisions based on one type of data. Even if your purpose is accountability – results orientation – it is likely that stakeholders will ask questions about attribution.

Finally, we believe that evaluation is a comparative process. That is, information gathered in response to the evaluation question needs to be compared to some standard or expected level of performance. These standards should be found in the program description – the elements of the description should be written in measurable terms. Measurable objectives should have at least three features: base performance – where the program started; target performance – where it is aimed for success; and, a time period in which the program will operate to achieve success.

In column three of the worksheet, the team must write a description of the information needed to answer the question – the three pieces of information referred to above should be included in the description. Information in this column signals the team about the judgments that will be made concerning the element of the program being measured and the basis upon which the judgment will be made. We think it is essential for the team to interview the program staff and key stakeholders associated with each question to identify the type of information needed to answer the question and the standards of performance. In column three, specific references should be made to required performance. For example, the team might say that, "according to the regulations associated with Public Law …, the program is required to reach … by …"

Worksheet VII

Evaluation Questions

Evaluation Questions	Design Referents	Standard/Information Needs

WORKSHEET VIII -- INFORMATION COLLECTION PLAN

After the team has posed the Performance Measurment Questions, members must devise an information collection strategy for each question. Before describing the components of the plan it should be emphasized that: 1) one strategy may respond to more than one questions; and 2) it is best practice to gather information from multiple sources/strategies for each question.

A typical Information Collection Plan is set forth in *Worksheet VIII*. While most of the entries are self-explanatory, two should be explained. First, note that the evaluation team may not want to use all members from a particular source. Therefore, a sampling plan is needed. For example, if it was not feasible to survey all parents, then a random sample should be drawn. Most introductory research texts discuss sampling strategies.

Second, if the data collection strategy is not available, the team will have to establish a development schedule. This will include the required field-testing to obtain indices of the reliability, validity and objectivity of the strategy. Again, an introductory research text should be consulted by the team.

*Worksheet VIII**

INFORMATION COLLECTION PLAN

Evalaution Questions	Collection Strategy (Method, Source, Sample)	Development Schedule	Administration Schedule

**See Worksheet IX*

WORKSHEET IX -- DATA ANALYSIS PLAN

Each collection strategy will generate data that must be cleaned (made ready for analysis), input analyzed and reported. It is good practice to use the field-test of the collection strategy to generate data to practice this process. Sample data tables will emerge which can be reviewed by team members and stakeholders to determine their appropriateness in response to questions, as well as precipitate additional data requirements.

For each data set a particular data analysis procedure will be applied. This procedure will depend on a number of things. First, the type of evaluation questions must be identified. It is descriptive, comparative or correlational? Second, what is the level of data – nominal, ordinal, interval or ration? For comparative questions the number of groups compared is important to the analysis decision as is the number of variable sin a correlational question.

A typical Data Analysis plan is found in *Worksheet IX*. The entries relate to the decisions described above. As in the Information Collection Plan, it may be necessary ton consult a research text or obtain outside assistance to complete this stage of evaluation planning.

WORKSHEET IX

DATA ANALYSIS PLAN

Collection Strategy	Data Analysis Procedure	Data Analyst	Availability of Results	
			Draft	Final

WORKSHEET X -- REPORT GENERATION

A vital step in the planning process is describing the vehicles for reporting the evaluation. The team must consider audiences for the report, their timelines, the format of the report as well as who is responsible for generating the report. It should be remembered that both formal and informal reports will be provided throughout the evaluation. All these decisions should be made prior to the start of the evaluation. Finally, all participants in the process should be made aware of the planned uses of the data prior to implementing collection strategies.

WORKSHEET X

REPORT GENERATION PLAN

Report Name	Evaluation Question(s) Addressed	Report Format	Audience(s)	Person(s) Responsible	Report Deadline

WORKSHEET XI -- MANAGEMENT PLAN

The Management Plan is the vehicle used to pull the evaluation planning products together in one place. It represents who will do what, when. for each evaluation question, a number of subtasks will have to be carried out. As the team might expect, these are related to the planning process steps just completed. For each evaluation question the following steps will be necessary:

- design/select information collection strategies,
- collect information,
- clean, store and analyze information,
- provide reports

The information required for the Management Plan can be taken from the previously completed worksheets. The team should consult Worksheet XIII to include these activities in the Plan.

It is useful to construct a timeline chart after completing the Plan. This is simply a matrix of major activities displayed according to the months of the year in which the OPM is conducted. It provides an excellent quick reference of expected accomplishments regarding the evaluation.

Finally, the team should note that the last column of W*orksheet XI* is labeled Monitoring Comments. We often use the Management Plan as a monitoring tool. That is, we meet on a regular basis and review the progress of our evaluation by reviewing the expectations as delineated in the Plan. This is a way to answer the implementation questions addressed in the Meta-Evaluation evaluation Plan (*Worksheet XIII).* The results of regular monitoring may be used as the basis for interim reports to stakeholder groups.

WORKSHEET XI

EVALUATION MANAGEMENT PLAN

			Expected		
evaluation Questions	Sub-Tasks	Person(s) Responsible	Start	Completion	Monitoring Comments

WORKSHEET XII -- EVALUATION BUDGET

Evaluation takes resources! The evaluation team must be reimbursed for their time and travel. Even if internal staff members are used, their work loads must be shifted. If consultants are used, they too must be remunerated. Supplies and materials will need to be secured as will other resources including phone, postage, and copying and computer time. Respondents may have to be paid. All these costs should be considered as the plan emerges. In the final analysis some activities may have to be revised if costs are excessive.

The worksheet on the following page enables the team to project costs according to planned evaluation activities. It should be completed after the Management Plan.

WORKSHEET XII

EVALUATION BUDGET

CATEGORY	INFORMATION COLLECTION	DATA ANALYSIS	REPORTING MANAGING	MANAGING	META-EVAL (PM)	TOTAL
1.0 Personnel						
2.0 Benefits						
3.0 Staff Travel						
4.0 Materials & Supplies						
5.0 Equipment						
6.0 Other Expenses: 6.1 Communication (Telephone/Postage)						

CATEGORY	INFORMATION COLLECTION	DATA ANALYSIS	REPORTING MANAGING	MANAGING	META-EVAL (PM)	TOTAL
6.2 Copying						
6.3 Printing						
6.4 Consultant a. Honorarium b. Travel						
6.5 Computer Services						
6.6 Respondent pay						
6.7 Meeting Costs						
7.0 Total Direct						
8.0 Total Indirect						
9.0 TOTAL COST						

WORKSHEETS XIII, XIV, AND XV -- META-EVALUATION

The goal of evaluation is to provide information for program staff and stakeholders to reduce their uncertainties about the program and/or to confirm informal beliefs about the program's performance. The team is responsible for developing a mechanism to determine the extent to which this goal is achieved by the evaluation process they have designed, implemented and reported. This last step in the planning is called meta-evaluation. The same types of questions are addressed in the meta-evaluation as were used in the program evaluation questions. The meta-evaluation should be on-going – beginning at the design stage of the evaluation system, continuing through implementation and end with the final reporting process.

A sample meta-evaluation plan is set forth as Worksheet XIII. Don't forget to develop a budget for meta-evaluation after completing the plan!

After the Management Plan is completed, the team should conduct a force field analysis of the proposed evaluation effort. The team, using input from staff and stakeholders, should identify the forces that drive the successful implementation of the evaluation system and those that might restrain the success. The focus of the analysis could be on each question or on the complete measurement system. Worksheet XIV could be used for the analysis.

It is important to not only anticipate potential uses of the evaluation information **and** process, but also establish an on-going tracking system to chart the uses. Don't forget to look for unanticipated uses (and misuses!). Formal and informal methods should be used to capture the impacts of the evaluation. People will ask why you are spending precious program resources to conduct the measurement system – this tracking process gives you your evidence. Worksheet XV is presented as a tool for tracking the *performance* of the evaluation system.

WORKSHEET XIII -- EVALUATION META EVALUATION PLAN

META-EVAL EVALUATION QUESTIONS	EVALAUTION PLAN REFERENT	DATA COLLECTION STRATEGY	PERSON (S) RESPONSIBLE	REPORT INFORMATION

WORKSHEET XIV -- FORCE FIELD ANALYSIS

EVALUATION QUESTION:	
FORCES FOR being able to answer the question	**FORCES AGAINST** being able to answer the question

WORKSHEET XV -- UTILIZATION TRACKING FORM

EVALAUTION QUESTION	PURPOSE	DOCUMENT THAT PURPOSE WAS ACHIEVED