

Project Planning

# Project Evaluation Plan

# Project Name:

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| --- | --- |
| **Project Manager and Project Sponsor** |  |
| **Date approved** |  |
| **Version approved** |  |
| **Supporting File Location** | *E.g. Project Plan file location* |

*All Italicized text in this document is instructional and should be replaced before submitting to the Project Sponsor for approval.*

*An evaluation plan is a written document that describes how you will monitor and evaluate your program/project/intervention, as well as how you intend to use evaluation results for program improvement and decision making.*

## Background

*A succinct summary of the project and its objectives.*

## Purpose of the Evaluation

*What decision might the evaluation inform?  
Is the purpose to learn, to be accountable for resources, and/or to make a judgement about whether you succeeded/whether to continue an intervention?  
What have you promised publicly in terms of evaluation, will this be delivered?*

## Scope of the Evaluation

*Describe the project being evaluated. What is ‘in’ and ‘out’ of scope for the evaluation? Remember that a broad scope is likely evaluated at a ‘shallow’ level, a narrower scope is likely evaluated at more depth; a simple issue of resourcing.*

## Key Evaluation Questions

*These are the high-level questions you want to answer – consider what you would want to tell a Minister in an ‘elevator pitch’. These are often like research questions.*

*The evaluation questions should align to the program logic, and will seek to determine whether the short, medium and long term outcomes were achieved.*

*Ensure the target of the evaluation questions is clear (e.g. clinicians of a health service, patients of a particular service, rural mental health consumers).*

*Consider if there are questions to evaluate equity and partnerships.*

## Evaluation Methods and Approach

*This section will be guided by the evaluation question(s) – what methods will provide the most robust evidence to your audience, but are feasible within your resourcing and timeline constraints, to answer each question? What indicators will be used? Include at Appendix 1.*

*Ensure that the timeframe for data collection aligns to the timeframe required for the outcome of the evaluation to occur (e.g. a change in service delivery can be expected soon after a project is complete, however longer term changes in patients’ health behaviour will take longer).*

*Plan how you will ensure the evaluation methods reach a representative sample of the target group e.g. how will priority populations be included in the evaluation?*

*Aspects to consider in your planning might include:*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Evaluation question | Data collection | | | | Data analysis | | |
| Data and sample size (if relevant) | Data source | Responsibility | Timeframe | Approach (eg inclusion of a comparison group) | Responsibility | Timeframe |
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## Audience for the Evaluation

*Who will be interested in the findings? Are there primary and secondary audiences?*

*In what format will the evaluation findings be communicated to these audiences e.g. Project Evaluation Report to the Project Board, project evaluation presentation to stakeholders, newsletter article for consumers?*

*Refer to the stakeholder mapping and analysis process (which should have been used in Discovery or Project Design phase). Also Consider* [*Better Together*](https://www.bettertogether.sa.gov.au/planning-tools) *for resources relating to engagement of stakeholders if needed.*

## Timelines and deliverables for the Evaluation

*When are the findings needed? Consider any other key dates also. Develop a timeline for key evaluation deliverables.*

|  |  |
| --- | --- |
| Key Date | Deliverable |
|  | *Negotiate data collection from agencies* |
|  | *Governance meeting to confirm data collection is underway* |
|  | *Mid-project data collection provided* |
|  | *Data collection completed* |
|  | *Data analysis completed* |
|  | *Evaluation findings (report)* |
|  | *The date findings are needed* |

## Governance for the Evaluation

*Who will oversee the evaluation, and how?*

*Who will conduct the evaluation? The decision of external versus internal evaluation needs to balance factors such as:*

* *perceptions of independence of outcomes*
* *access to specialist skills and expertise*
* *knowledge of the program and context*
* *availability and flexibility to respond to changes in focus.*

## Resourcing for the Evaluation

*Describe staffing and budget requirements.*

*For example: The organisation will draw upon internal existing resources and networks as well as recruiting specific expertise required to support specific aspects of the project evaluation. The team will comprise:*

* *Project management support from XX*
* *Evaluation framework design from external supplier for $value.*
* *Data analysis and dashboard (or similar) expertise from YY*
* *Evaluation and report writing expertise from ZZ*

## Post Evaluation

*What will occur post-evaluation? E.g. Are there any monitoring activities that continue beyond the evaluation period that need to be continued and by who?*

*If this is required, a handover plan and migration strategy will also need to be factored into the evaluation timeframes and deliverables.*

**Appendix 1: Primary Indicators**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ID | Metric | Definition | Source | Purpose |
| *e.g.* | *Number of ‘000’ calls* | *No. of ‘000’ calls received by SAAS during the period, disaggregated by priority, day, period, outcome (e.g. ambulance attendance required)* | *SA Ambulance* |  |
| 1 |  |  |  |  |
| 2 |  |  |  |  |
| 3 |  |  |  |  |
| 4 |  |  |  |  |
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**Document Control**

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