

Evaluation utilisation planning checklist

We do not want evaluation findings to sit in a literal or figurative bottom drawer – we want evaluation to enable genuinely evidence-based decisions about how to improve our work and maximise its intended impact. Based on Michael Quinn Patton’s work¹, this checklist supports you in planning for evaluation usage by those who make those decisions. These items may not all be feasible, but provide guidance on genuine utilisation of evaluation.

Identify, organise and engage intended users

- Find and involve intended users
- Create a shared collaboration space (e.g. Teams) to facilitate ongoing engagement with intended users
- Explain the role of intended users in the evaluation process
- Orient any new intended users along the way
- Explain the role of intended users throughout the evaluation process
- Orient any new intended users along the way.

Notes:

Work with intended users to develop program theory and evaluation questions

- Create shared online whiteboard (e.g. Lucid) to share evaluation planning
- Schedule workshop times with intended users in advance
- Develop needs analysis (e.g. problem tree) with intended users (or provide for review, input & approval)
- Develop program theory (e.g. logic model) with intended users (or provide for review, input & approval)
- Develop evaluation questions with intended users (or provide for review, input & approval)

Notes:

¹ Utilization-Focused Evaluation (U-FE) Checklist (2013) https://files.wmich.edu/s3fs-public/attachments/u350/2014/UFE_checklist_2013.pdf

Share evaluation plan with intended users and identify any limitations upfront

- Share evaluation plan with intended users for review, input and approval
- Explicitly draw intended users' attention to the limitations section of the plan and discuss their expectations

Notes:

Determine information and reporting needs of intended users

- Identify any upcoming decisions or deadlines that the evaluation should meet to be useful
- Understand political context for the evaluation and how that may affect use

Notes:

Plan how you will meet the information and reporting needs of intended users

- Agree upon a meaningful cadence for information and reporting with intended users
- Based on your agreed cadence, schedule workshops and meetings (or repurpose existing slots) to facilitate sharing of evaluative insights as they arise

Notes:

Gather data with ongoing attention to use

- Ensure that data gathering (qualitative and quantitative) will answer the questions asked by intended users
- Adjust data gathering to meet any meaningful needs that arise for intended users

Notes:

Use templates when developing informal and formal reports for intended users

- Use the *Internal evaluation report template* (as this is designed to meet internal reporting requirements) for formal reports
- Use the *CQI reflection template/guide* (as this is designed to meet teams' needs for CQI) for informal reports

Notes:

Follow up with intended users to facilitate and enhance use

- Follow up with intended users either formally or informally to assess whether evidence is sufficient for decision making

Notes:

Review usage of evaluation

- Follow up with intended users formally to assess whether evaluation findings were used, how they were used, and how useful they were
- With your team, identify any success stories or areas for improvement in evaluation utilisation

Notes: