

Tentative Title for the Evaluation Exercise

Example: End-of Program Evaluation, Sierra Area Community Development Program

Acknowledgements

List of people that helped prepare the design document. Persons thanked.

[insert name of principle authors here]

[insert date here]

Glossary

Explanations for acronyms, abbreviations and phrases that may not be known outside the organization.

Introduction

- How the document was prepared, who did what. (This is important for reflecting on the alignment of design activity with organization core values.)
- Reference to the previous management reports, especially identified issues.

Description of Program

- What project or program is being evaluated? Outline the context (such as political, cultural, socio-economic, religious situation) and characteristics of the project or program (including changes made as a result of redesign or reflection exercises, if applicable).
- What are the main program or project objectives? Describe any significant changes to the original objectives or plans. If it is an evaluation of an ongoing activity, describe the current state of implementation, indicating any notable successes or problems.
- What is the annual budget, number of beneficiaries, major donors, project duration, etc.? For programs: anticipated life-of-program budget, number and kinds of projects implemented so far and a description of direct (project level) and indirect (people groups, institutions, organizations, beneficiaries) partners.

Evaluation Stakeholders

- Who are the groups and individuals that have a major interest in the evaluation?

A chart of the groups and the primary interest for each is helpful. This chart will be validated in the design process.

Group	Primary Interest Regarding Accountability	Learning Objective (May not apply to all groups)	Empowerment Objective (May not apply to all groups)

Evaluation Purpose and Objectives

Purpose: An evaluation should have one and only one purpose or focus. Trying to achieve several purposes with limited resources usually dilutes the usefulness of the evaluation.

Objectives: Specific areas that will be covered by the evaluation exercise, along with objectives for stakeholder learning and empowerment.

Information Needed

What information is needed to achieve purpose and objectives, and from where can it be collected? This section should be guided by the Monitoring and Evaluation plan outcome and goal level indicators.

Recommendations

Which specific issues require recommendations from the evaluation team?

Evaluation Methodology

The methods for collecting and analyzing information to achieve evaluation purpose and objectives. Provide specific details such as procedures for convening and facilitating focus groups, sampling procedures for surveys, field testing survey items, training survey interviewers, procedures for analyzing qualitative data, procedures for assessing trustworthiness of data, etc.

Unusual Limitations

All evaluation exercises are limited in some way by time, money, and available expertise. This section should describe unusual limitations, such as a directive from the Board of Directors to complete a report to the Board within less time than normally expected.

Evaluation Team and Partners

The evaluation team members are directly responsible for all aspects of the evaluation exercise. Generally each team member will have a specific role. People that provide information are not team members. List the team members and their roles and responsibilities.

Evaluation Team Advisors

Generally this is a small group of key stakeholder representatives that are kept informed as the evaluation proceeds, but they are not expected to directly participate in detailed planning,

implementation, and reporting. Their input and feedback is always given serious consideration by the Evaluation Team.

Time frame

Week by week list of major activities. Daily activities are scheduled when pertinent information becomes known (e.g. interview times, focus group times, etc.)

Logistics

Vehicles, required equipment, venues, meeting spaces for evaluation team, lodging and meals, etc.

Products

The evaluation written technical report will include all information needed by another evaluator to determine the quality of the evaluation exercise. This report is not intended to be disseminated to stakeholder groups; other products will communicate the evaluation findings to them.

Executive Summary will include

- Evaluation purpose and objectives with brief description of the extent to which each objective was achieved; explanations for not achieving objectives
- Conclusions and recommendation

Means for communicating findings to each stakeholder group: e.g. outline for conference call with senior management, poster for community groups along with a discussion guide, PowerPoint slides for partners, etc.

Report that describes changes made to design document and reasons for change

Budget

Consultant fees, travel expenses, accommodations and meals, vehicles and fuel, other.

Note who will be paying for the expenses.

Documents used in preparing the design

Terms of Reference or Evaluation Scope Document (includes at least the reasons for doing the evaluation, primary objectives, start and end dates, estimated cost, evaluation team leader)

Program Design Document

Management Reports

Etc.

Lessons Learned about preparing a design document

Appendices for technical material