How to prepare for an Evaluation.

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Before Starting a Project: The Design Phase

- [ ] Conduct baseline data collection and keep track of the methodological practices used, as well as the sample of the group. This will set the benchmark that the evaluation will compare the project outputs against at the end of the program.
- [ ] Design project implementation to cover a control group (this will affect impact).
- [ ] Design an M&E framework to consider outputs that contribute specifically to outcomes (This will inform direct correlation).
- [ ] Design M&E to consider demographical data collection (this will inform equitability of approach later).
- [ ] Create M&E mechanisms that can be agile and adaptive to project pivoting, adding new aspects, and collecting data to track outputs and outcomes - always ensuring pre- and post-data collection (This will inform attribution).

Duration of Project: The Implementation Phase

- [ ] Starting from the project design process, keep very clear documentation, and organize all materials in chronological and subject-specific order.
- [ ] Explain project goals, outputs, and intended outcomes to show monitoring and evaluation processes to all project staff.
- [ ] When possible, utilize a cloud data management system and hyperlink documents into a central place, like your logical framework, to keep everything easily accessible and organized.
- [ ] Keep a running track record of stakeholders and actors involved in the project throughout the duration.
- [ ] Discuss with the donor how your Theory of Change works in practice - remember it's OK if things aren't going as planned. The point is that both the donor and your organization are adapting and learning.

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Before an Evaluation: The Prep Phase

- [ ] Design external evaluations Terms of Reference together with your team - consider: A.) what your donor wants to learn, B.) what you want to learn, and C.) what is feasible to achieve with the available budget and timeline.

- [ ] Prioritize 8-12 key research questions (sub-questions are OK) - be ready to change and adapt the question with support from the Consultant you choose (They are the experts, so they can help you!) Set budgets! Consultants build strategies around how much funding is available, so knowing the value of the project is essential.

- [ ] Before the evaluation begins, organize your own project documents and contact lists.

  Before the evaluation is even advertised, communicate with all team members to let them know that an assessment will take place - calm their nerves and tell them what to expect.

During the Evaluation: The Assessment Phase

- [ ] Discuss evaluation goals and be willing to adjust research questions and evaluation processes with the support of the selected Evaluator to achieve those goals.
  Provide documentation and guiding notes to the evaluator.
  Inform all relevant stakeholders that the evaluator may request to meet with them during the evaluation.

- [ ] Remain inquisitive and have regular check-ins with the evaluator.

- [ ] Remain calm, collected, and prepared for constructive feedback - even if you have the best project, there are always ways to learn.

- [ ] When letting stakeholders know that there will be an evaluation, simply share information; do not tell them how to engage with the evaluator and evaluation process, and do not coach them on what to say about the program.

- [ ] DO NOT change data or information during the evaluation.

- [ ] Do provide feedback on the evaluation report in ONE document, with consolidated comments from the whole team - discuss the findings together and decide how to include everyone’s feedback before delivering it to the Consultant.

- [ ] Utilize the evaluation to adapt or design new projects based on the lessons learned and recommendations developed - a good evaluation leads to actionable improvements!