

Capacity+ Template Program Monitoring and Evaluation Plan

Overview. {Your organization here} employs a monitoring and evaluation approach to all programs as a strategy to integrate program data into programmatic decision-making (Empowerment Evaluation, Fetterman, D. 1994; Equity-focused Evaluation, Jones, Bensimon and Dowd, 2011; Rapid Cycle Quality Improvement, Health Workforce Technical Assistance Center, 2016;). The evaluation plan establishes a standardized cycle of data collection including measures of program quality and intermediate benchmarks towards annual program outcome goals. These intermediate measures provide the critical first assessment of whether {your organization here} programs are on target to meet their objectives. Reviewing these indicators early allow mid-course corrections. This process, of incorporating evaluation into program design, implementation, and management follows state-of-the art guidance and positions [your organization here] to over-determine program success.

Project Management Team Strategy for Evaluation. A program-specific project management team (PMT) is responsible for overseeing the implementation and evaluation of all {your organization here} programs. The PMT includes the program director and {your organization’s list of relevant [core implementation, evaluation, and reporting staff or volunteers]}. A subset of the PMT, the evaluation team, presents program updates at each PMT meeting and prepares special analyses requested by the PMT. PMT members will review updated output (e.g. attendance, number of activities offered) and outcome measures collected and review aggregated data for the whole group to identify overarching patterns. The leadership team’s monthly assessment meetings enable program adjustments at both the individual participant and program level. At the individual level, reviewing the results for each participant individually and as a group allows for tailored supports or a plan for a more rigorous program. At the program level, reviewing patterns of service provision, attendance, and impact identifies areas to refine, amplify, or abandon. The formative evaluation is conducted as an ongoing cycle of review, mid-course correction, and review of the outcome of those corrections to achieve ongoing program improvement. The core formative questions which follow drive the direction of the formative evaluation.

MONITORING AND EVALUATION CYCLE

We are ALL the Evaluation Team – Project Management Team, Executive Director, Participants/Families, BOD, Volunteers



Monitoring and Evaluation Core Questions.

1. Were program activities offered at sufficient frequency?
2. Did participants indicate satisfaction and engagement with the program?
3. Did participants attend the activities?
4. Did higher attendance result in better outcomes?
5. Are the goal participation rates and outcome goals on track for achievement by year end?
6. Were there any patterns of disparate *attendance* among groups of participants?
7. Were there any patterns of disparate *outcomes* among groups of participants?
8. Was a mid-course correction planned and implemented to address any disparate attendance patterns or outcomes?
9. After the mid-course correction, was the identified disparity reduced?
10. Was the program design consistent with evidence-based practice?
11. Is the program cost-effective and sustainable? Were in-kind resources and volunteers used at capacity?
12. Do the auxiliaries and other volunteers have the training and support they need to conduct their tasks?
13. Is the program inclusive?

Summative Evaluation and Report. The summative evaluation and report, conducted at the end of each year using the quantitative measures collected throughout the grant-funded project as monitoring and evaluation activities, assesses the degree to which the program met its objectives. As the monitoring and evaluation process reviews progress towards those objectives throughout the year and makes corrections, intentional implementation of the monitoring and evaluation plan over-determines positive results from the summative evaluation. By design at the beginning of the project, this summative evaluation matches the reporting requirements for the funder.

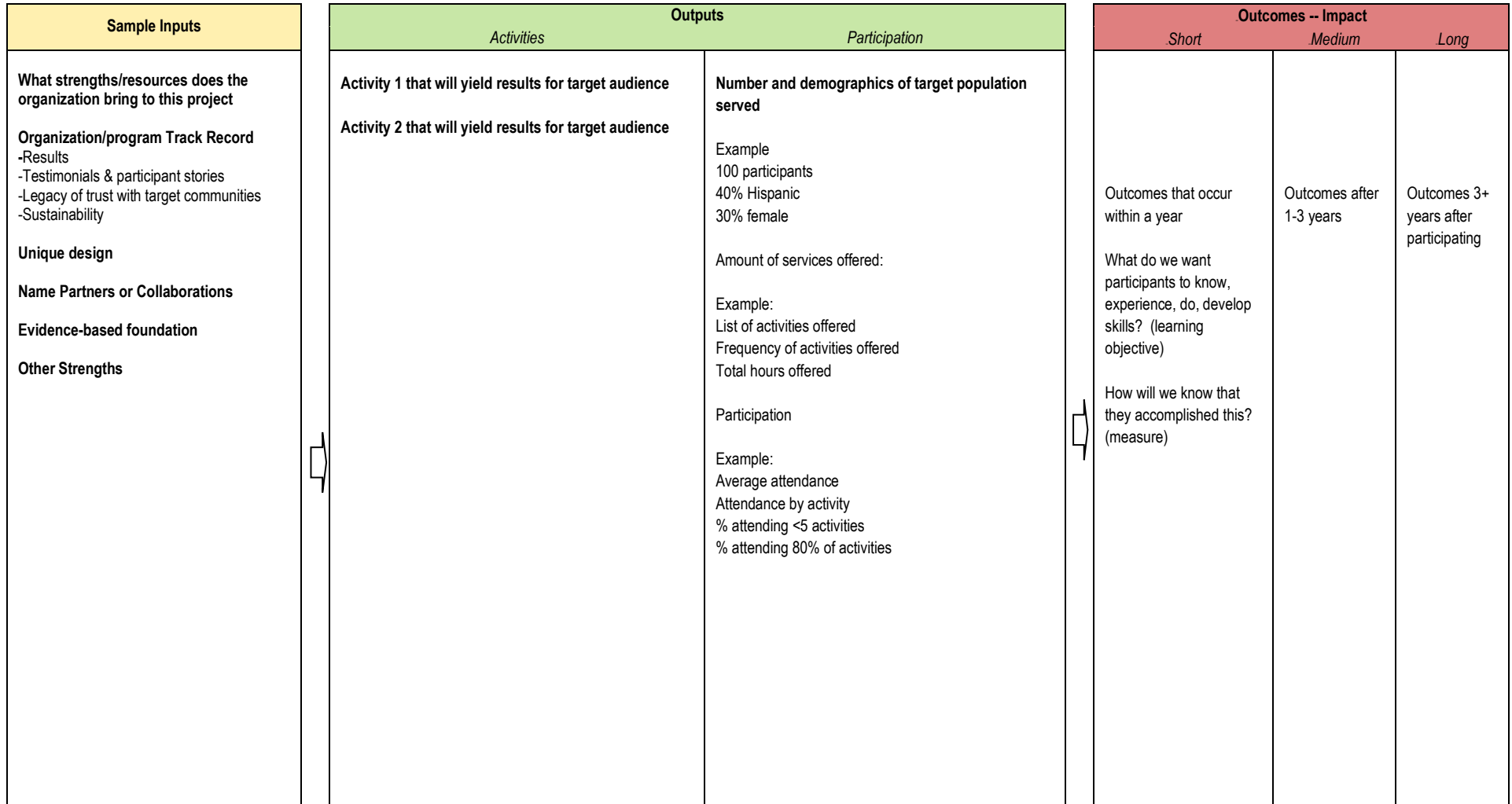
Table 1: Monitoring and Evaluation Data Processes

DATA COLLECTION INSTRUMENT	
IDENTIFY INSTRUMENTS	<p><i>What information do we need?</i> -Review the proposal and required reports. Identify demographics, program activities (e.g. types of workshops held), and outcome measures required.</p> <p><i>What do we already have?</i> -What information is already collected? -What could we easily collect? - Can we make minor changes to our data collection to collect the data we need?</p> <p><i>What essential data requires more work to collect?</i> - How can we collect the data during our existing participant activities? -Create qualitative instruments (focus groups, interviews, rubric assessments of participant products) when quantitative measures cannot measure the activity or outcome.</p>
BASELINE	<ul style="list-style-type: none"> - <i>Application</i> <ul style="list-style-type: none"> -Demographics - Other application data relevant to showing participant status at program start -Measures of participant interests/goals - <i>Public Use Data</i> <ul style="list-style-type: none"> -Append context data (e.g. neighborhood or school level data)
PROGRAM ACTIVITIES	<ul style="list-style-type: none"> -Attendance and program retention -Number/type of activities offered -Completed milestones on way to program completion -Engagement
OUTCOMES	<ul style="list-style-type: none"> -Measures of achievement of program goals for participants
DATA ADMINISTRATION PROCESS	
	<ul style="list-style-type: none"> -Identify conditions for best quality of data collection (during workshop, before debrief, etc) -Are we getting the quality of data that we want? Sufficient numbers? Completed? Thoughtful data? Captures individual growth and need for intervention? Data collection buy-in by respondents and persons administering instrument?
DATABASE DESIGN	
	<ul style="list-style-type: none"> When necessary: create templates for each type of dataset (e.g. attendance, participant feedback etc)
DATA ENTRY AND CLEANING	
	<ul style="list-style-type: none"> -Identify and use online platforms (e.g. google forms) to maximum extent for initial data entry directly by respondents. -Double-check data entry after each participant -Update changes – address, phone, etc -Identify any missing data and enter that -Update attendance each program day -Check all entries and confirm same spelling (e.g. always Road, not Rd or ROAD) - Add external data, e.g. neighborhood level data or survey data
DATA SUMMARIES	
	<ul style="list-style-type: none"> -Standard summaries: After each session produce e.g. averages, cross-tabs, graphs -Equity: Does program participation or outcome vary by group: e.g.gender, race, income, weather on program day, type of activity, facilitator -Outcome: activity-specific learning outcome, program goals -Qualitative: interviews, focus groups, whole product coding
MID-COURSE CORRECTIONS	
	<ul style="list-style-type: none"> -Interpret gaps between groups, identify individuals in need of support or opportunities -Determine interventions, implement them, and measure outcome of intervention

Evaluation Plan – Table 2: Samples of Specific Measures for Monitoring and Evaluation

Measure	Examples of Specific Measures									
Attendance	<p>Total daily attendance each session Average daily attendance Total program hours delivered Average number of program hours per participant % Attending at least 80% of sessions % Attending less than 50% of sessions % Attending 0 sessions (applied but never attended); % attendance Q1>Q3 (attendance drop off)</p>									
Sample domain of interest: Self-Efficacy	<p>General Self-Efficacy Scale (Chen, Gully & Eden, (2001)) [Your organization replaces with their interest] 1. I will be able to achieve most of the goals that I set for myself. 2. When facing difficult tasks, I am certain that I will accomplish them. 3. In general, I think that I can obtain outcomes that are important to me. 4. I believe I can succeed at most any endeavor to which I set my mind. 5. I will be able to successfully overcome many challenges. 6. I am confident that I can perform effectively on many different tasks. 7. Compared to other people, I can do most tasks very well. 8. Even when things are tough, I can perform quite well.</p>									
Diversity	<p>Sample indicators -Number of and diversity between schools (percent low income, college-going rate) -Number of neighborhoods and diversity among neighborhoods in % of college graduates/income -Participants: percentage low income, gender, grade, % needing accommodations</p>									
Program Quality	<p>Sample frameworks: -Center for Youth Program Quality Framework</p>									
Equity-Focused Evaluation	<p>-Measures of disparities in outputs or outcomes by group, mid-course correction reflecting disparities found, measure and conduct mid-course corrections until disparity reduced to target range: outcomes are attendance and outcomes.</p>									
Academic Outcomes	<table border="0"> <tr> <td>Chronic Absence (20+ days)</td> <td>GPA</td> <td>College preparatory coursework</td> </tr> <tr> <td>College enrollment</td> <td>College retention</td> <td>Highest Grade Completed</td> </tr> <tr> <td>Exam Score (e.g. GED, TABE, SAT)</td> <td>Certification in XXX</td> <td>Diploma in XXX</td> </tr> </table>	Chronic Absence (20+ days)	GPA	College preparatory coursework	College enrollment	College retention	Highest Grade Completed	Exam Score (e.g. GED, TABE, SAT)	Certification in XXX	Diploma in XXX
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TEMPLATE LOGIC MODEL – YOUR GRANT PROJECT AT A GLANCE



Assumptions

Why do you believe that your project will have the intended results with your target audience? (your organizations track record, evidence-based practice). What is the logical link between the activities, outcomes and outcomes?

Monitoring and Evaluation

Data Collection Tools: List of all the instruments you will use to gather data for monitoring and evaluation. See table 1 and 2, pages 3 and 4.

Analysis Approach: Templates include Empowerment Evaluation, Fetterman, D. 1994; Equity-focused Evaluation, Jones, Bensimon and Dowd, 2011; Rapid Cycle Quality Improvement, Health Workforce Technical Assistance Center, 2016

Table 3. TEMPLATE - Data Collection and Reporting Requirements by Funder or of Internal Interest to Organization

Report Item (examples below)	Funder 1	Funder 2	Funder 3	Funder 4	Funder 5	Data of internal interest to Organization
Daily Attendance	X		X	X	x	x
Daily Start and Stop Time					x	x
% Attending at least 80%		x				x
% Attending less than 50%						x
Required funder survey	X		X	X		
Promised outcome 1 from proposal	X		X	X		X
Promised outcome 2 from proposal	X		x	x		X
Work Readiness Survey					x	X
# Social Media Mentions				X		
#/Content of Press Release				X		
Individual Success Stories			x	X		X
Lessons Learned and Response	X	X	X	X		X
Goals and objectives met? If not, why not?	X					
Describe activities conducted. On time? Milestones met?	X					
In kind total – non-personnel: food, transportation, registration, etc	X	X				x
Volunteer value - \$29.51/hour for general volunteers; cost of professional services (e.g. photographer): hours and total value		X				x
\$ total – non-personnel	X			X		x
Personnel cost	X			X		x
Total and line item expenditures	X			X		X
# Volunteers						
Ratio of volunteers to participants	X			X		X
# of Activities Offered	X	X				X
Type of Activities Offered		x				x

Sustainable and Effective Monitoring and Evaluation Structures Focus on Monitoring the Shared Goals

