

Step 2c

Create an evaluation plan

In brief

Create an evaluation plan that sets out how you will measure, capture and analyse information about your programme. Your plan should also consider how you will learn from your evaluation, and how you will share your findings.

Key resources

- Evaluation Plan Template
- Learning and Sharing Plan
- Theory of Change

Why it's important

- ▶ To ensure your evaluation stays relevant and connected to your evaluation questions
- ▶ To think in detail about your evaluation and how it will work
- ▶ To help you plan your resources
- ▶ To check that each stage of your evaluation builds upon the previous stage and informs the next

What's involved

Start by setting up a Learning and Sharing Plan. This will ensure you take into account the key audiences for your evaluation and what they need to know – and will have implications for the type of data you collect and when findings need to be available.

This will ensure your organisation is ready to learn and that your evaluation (and therefore the fieldwork and analysis) is plugged in to key decision-making points: that it is geared up to deliver the findings that are needed, at the time they are needed. At each reporting stage you should also plan to review and revise your Theory of Change in light of your learning.

Then start to plan your evaluation, using the Evaluation Plan Template, building in key dates (such as future decision making points, or the times at which it will be easiest to conduct surveys or other evaluation activity) and the resources that will be needed.

Consider your approach to capturing data and how you can measure your outcomes with minimal burden on people. This is particularly true when using methods such as questionnaires, and if you are using case studies or participatory evaluation then more intensive input from the people involved will be needed and you should consider their time and other needs. This will help you to get good response rates/participation rates (the proportion of beneficiaries who agree to take part in follow up research) and therefore make your findings more reliable.

Further reading

- [How to develop a monitoring and evaluation framework \(NCVO/Charities Evaluation Service\)](#) – Detailed guidance on developing an evaluation plan and setting indicators for your outcomes.