

Evaluation Planning Checklist (1 of 2)

Planning Checklist

Planning is a crucial part of the evaluation process. The following checklist (based on the original APCRC checklist) has been designed to help with the process of carefully planning your evaluation, outlining the key steps going forward.

Identify	Questions to ask
Study type	1. Is this a service evaluation or research?
Project Governance	2. Who will take responsibility for getting the evaluation off the ground and oversee its delivery? 3. Who will write the evaluation plan, identify the required resources and engage stakeholders? 4. Do you need an advisory or steering group?
Project resources	4. What resources are available to support this evaluation? What resources do you think you might need / how much might it cost? Who might fund the evaluation? 5. What level or type of evaluation do you need?
Support for the project: All Stakeholders	9. Who are your key stakeholders? 9. Who needs to be informed? 10. Who do you need to involve in the evaluation planning, delivery and dissemination? 10. Who has skills, experience and expertise to support you with your project? i.e. Patient and public involvement, equalities, communications and engagement, evaluation leads in your own or partner organisations
Support for the project: Service User Involvement	14. How will you involve service users, patients, carers and the public in your evaluation? Consider this in terms of the design, delivery (data collection) and dissemination (communicating your findings).
Context: Evidence Base	19. What is the evidence base for the planned service, service change, pilot? 20. How have similar services been evaluated in the past?
Context: Understanding the Service	19. Is it clear who the service is for? (population group, needs and characteristics) 20. Is it clear what the desired intermediate and long term outcomes are and how the activities of the service or intervention will lead to these?
Scope of the project	19. Have you agreed with your stakeholders the purpose of the evaluation? 20. Are you clear what the evaluation will focus on? 21. Is it clear why you are conducting an evaluation?

Evaluation Planning Checklist (2 of 2)

Identify	Questions to ask
Aims and Objectives of the evaluation	23. Have you engaged your stakeholders to help you identify your evaluations aims (why you are doing this evaluation) and objectives (what you are trying to achieve)? 24. Are your aims and objectives SMART?
Evaluation approach	25. What evaluation approach or method are you planning to take? 26. Do you need to commission an external evaluation?
Data requirements	26. What information and data do you already have available to support your evaluation? 27. What additional data collection do you need to undertake to be able to answer the aims and objectives of your evaluation?
Data Collection, Analysis and Reporting	26. What data do you need to collect? Will your data collection tools work? Are there any validated tools that can help? Who will collect the data? 27. How will you analyse the data? Who will analyse the data? 28. How and who will write up the findings? 29. Have you identified any training needs to support these activities?
Timescales, responsibilities and resources	28. What are the timescales for the evaluation and the data collection? 29. Who will be responsible for each of these? 30. Do you need any additional resources or funding?
Information Governance	30. Have you reviewed your organisational policies on Information Governance including data protection, storage and use to ensure that your evaluation plan complies or sort advice from your information governance lead? 31. Have you sought relevant permissions to undertake the service evaluation?
Ethical implications	32. Have you considered the impact of your evaluation on the participants and the service? 33. Have you put adequate safeguards in place to protect the participants in your study? Including gaining consent and feeding back findings.
Recommendations and action planning	34. Have you agreed your recommendations and how you are going to implement them? 35. Have you developed your action plan?
Sharing the findings	35. How are you going to feedback the findings from your evaluation to your stakeholders? 36. Have you developed a communication plan to share your findings and recommendations?
Are you still doing an evaluation?	29. Once you have planned your evaluation recheck whether you are doing a service evaluation or research to ensure that you have the appropriate permissions and approvals for starting the project.