A-GUIDE Nonprofit Partner
Funding Evaluation Plan INSTRUCTIONS

Simply put, an Evaluation Plan is a written protocol to (1) translate outputs and outcomes defined on the organization's Program/Project Logic Model(s) to measureable performance indicators and (2) identify specific procedures, personnel, schedule, and tools/instruments to collect, analyze, and report data comparing actual to projected performance. ***The Logic Model(s) must be complete before the Evaluation Plan may be developed.***

These instructions are intended to provide guidelines specific only to the Delray Beach CRA Funding Evaluation Plan. Organizations with limited knowledge of or experience with evaluation planning are advised to obtain training and/or technical assistance.

1. Rename the file using the following format: "Eval Plan, Organization Name, Due Date.doc"

2. Enter the organization name, Fiscal Year, and application due date in the footer

3. Complete the organization information

    - Organization – legal name of organization

    - Contact Person – person responsible for preparing the Evaluation Plan

    - Names of Program/Project A and, if applicable, B, consistent with other application materials

    - Funding Period – fiscal year or part for which funding is requested for each program/project

4. Copy-and-paste the blank table as many times as needed to have one for each Key Activity listed in the Logic Model for each program/project (Program/Project A and, if applicable, B).

5. Complete the table for each activity – the space will expand as you enter text:

    - Mark Program/Project A or B with an "X"

    - Fill in the Key Activity number and name or brief description in a few words, just enough to identify the activity

    - List the <u>OUTPUTS</u> in the appropriate column to the left – be sure the indicators are measurable; you may be able to copy-and-paste each section directly from the Logic Model

    - Fill in the related Evaluation Process for each output (shown on the left) in the column to the right – include who will be involved in the process, specific methods and tools to be used to collect data, and the schedule or time frame for evaluation processes

- List the OUTCOMES/Measurable Indicators in the appropriate column to the left (below the Outputs) – be sure the indicators are measurable; you may be able to copy-and-paste each section directly from the Logic Model

- Fill in the related Evaluation Process for each outcome (shown on the left) in the column to the right – include who will be involved in the process, specific methods and tools to be used to collect data, and the schedule for evaluation

- Some evaluation processes may be used for more than one indicator – it is not necessary to repeat the entire description as long as you make this clear in the table

6. Repeat the above in a separate table for each activity shown on the Logic Model(s)

7. Complete "Narrative response" items #1 - #10

8. The Plan must be signed by the organization's executive and Board leaders to indicate their approval and commitment; type in their names and correct titles under the signature line

9. Attach the Logic Model(s) on which the Evaluation Plan was based

The Evaluation Plan serves as the basis for required quarterly and annual reports in which funded organizations will document their progress toward projected outputs and outcomes. Refer to separate reporting forms and instructions.