EVALUATION

DESCRIPTION

This tool focuses on goal-based evaluation – looking at whether the strategic areas and goals are still a good fit, still feasible, and are being actively addressed. When looking at outcomes and performance, refer to **Monitoring and Measurement**.

RATIONALE

- Useful for reflecting back on the progress of the program, and making important adjustments based on feedback to ensure that goals will be met

- Keeps programs responsive, flexible and well-informed

LOGISTICS

Duration: 30-60 minutes to establish evaluation plan; varied for execution

Format: easiest for the project lead to complete

Key Players: project lead

Resources: Current strategic plan

OUTPUT

Evaluation framework and plan; Revised strategic plan if applicable

PROCESS

1. If you haven't already, decide on how often you will evaluate the strategy. Typically, it's a good idea to do it midway in the strategy timeframe, and again at the end, as you decide how you want to move forward. Review your performance measures and integrate the information being tracked into your evaluation activities.

2. Look back to your stakeholder list, and decide how you would like to include them in the evaluation. Brief interviews using specific questions, or even a survey, are useful tools for consulting with stakeholders.

3. Draft a series of questions that will help you determine if your strategic goals are actively being pursued, and if any challenges have arisen. Develop into an evaluation plan using the template on the following page. Generally, you want to explore:

    - What is the status of the strategy's progress towards achieving the original goals?

    - Are the original timelines and resource allocation still sufficient?

    - Do the goals and strategies still reflect the needs of the community?

    - What challenges exist to achieving the goals? How can they be overcome?

    - What adjustments, if any, need to be made to the plan?

4. After going through this evaluation process, decide how you will report on the findings, and what steps will be taken to adjust or refocus your strategy.

STRATEGIC PLANNING TOOLKIT

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EVALUATION

SIMPLE EVALUATION PLAN AND EXAMPLE

The table below provides an example of an evaluation plan that reflects on the overall strategy status and direction. It is often easiest to explore a series of questions related to each strategic area with the relevant stakeholders, and then address general questions about the overall strategy to the project team. Collecting information for each question can be as simple as a series of discussions or interviews, or you could integrate additional documentation review, surveying, online discussion/social media feedback or focus groups. See **Evaluation Plan Template** for a customizable version.

Strategic Area	Evaluation Question	Information Source	Method	Responsibility
PA1: Business Retention and Expansion	What is the status of this strategic area and activities?	Project lead, chamber, business stakeholders, local gov staff	Interviews, online questionnaire, workplan review	Project lead
	What have been some of the benefits so far?	Project lead, chamber, business stakeholders, local gov staff	Interviews, online questionnaire, measurement and monitoring	Project lead
	Have there been any challenges?	Project lead, chamber, business stakeholders, local gov staff	Interviews, online questionnaire, measurement and monitoring	Project lead
	What changes, if any, are needed to ensure success?	Project lead, chamber, business stakeholders, local gov staff	Interviews, online questionnaire, focus group	Project lead
Overall	Was the process for establishing the strategic areas, goals and actions effective?	Project lead, project team, stakeholders	Discussion group	Project team
	Are the timelines and allocated resources still feasible?	Project lead, project team, stakeholders	Discussion group	Project team
	Do the overall goals and activities still reflect the needs of the community?	Project lead, project team, stakeholders	Discussion group	Project team
	What adjustments are needed to the overall plan, if any?	Project lead, project team, stakeholders	Discussion group	Project team

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TIPS

This type of evaluation is based on observation and feedback – it's a way to "check the temperature" of the program to see if any adjustments or course corrections are required. For looking at performance and specific program data and indicators of success, use performance measurement.

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