Guidance on tasks and deliverables for different evaluation phases

This tool describes the five key phases of evaluation, from planning and design, to implementation and communication of results. It provides a list of the main tasks and deliverables for each phase, intended for use by anyone managing an impact evaluation. This tool was developed by Irene Guijt, Simon Hearn, Tiina Pasanen and Patricia Rogers for use in Methods Lab projects. It follows to some extent the BetterEvaluation Rainbow Framework.

1. Preparation

Main tasks
- Conduct a desk review of key programme documents.
- Liaise with the programme team and key implementing parties to identify evaluation needs and potential evaluation questions.

Deliverables
- Concept note outlining:
  - Evaluation purposes and objectives
  - Stakeholders and governance
  - Potential evaluation questions and learning objectives
  - Budget and contractual arrangements
  - Estimated timeline and next steps

2. Evaluability assessment

Main tasks
- Assess the plausibility, utility and feasibility of the evaluation. This process typically includes:
  - Document review
  - Interviews with key informants
  - Stakeholder engagement workshop to prioritise key evaluation questions and broad design options

Deliverables
- Evaluability assessment report including:
  - Priority evaluation questions
  - Recommendations regarding whether or not an evaluation is plausible, useful and feasible
  - Appropriate evaluation design options

3. Design

Main tasks
- Identify potential design options
- Assess the fit and feasibility of each to answer the priority evaluation questions
- Recommend a specific approach, noting advantages and limitations

Deliverables
- An evaluation plan providing:
    - A detailed description of the evaluation design, including what information will be gathered, analysed and interpreted when, by whom and how
    - The type of support that will be provided by implementing staff and other stakeholders
    - A process for communicating progress, and for reviewing and disseminating findings
    - Estimated costs
    - Estimated timeframes

4. Implementation

Main tasks
- Contract the evaluation team
- Gather primary data
- Analyse primary and secondary data
- Communicate progress and limitations
- Draft the evaluation report

Deliverables
- Draft evaluation report including:
    - Evaluation purpose
    - Evaluation questions, methods and data sources
    - Findings and recommendations
- Primary data collection instruments:
    - Questionnaire
    - Interview and focus group discussion guides
- Response to reviewer comments on the draft report

5. Communication

Main tasks
- Revisit target audiences and communication mechanisms
- Present findings to key stakeholders
- Blind sections of the report as necessary and make the report publically available

Deliverables
- Dissemination log