

13. Managing the evaluation

13.1 The need for a management plan

13.2 Tasks involved

13.1 *The need for a management plan*

An evaluation exercise is a project in itself, and requires a management plan. The plan may be very simple if the evaluation itself is limited in scope and only involves one or two people. It may simply be a series of dates in a calendar. However, it's more than likely that an evaluation team is engaged in a reasonably comprehensive evaluation, and so the plan needs more thought and detail.

The purpose of the management plan is to track all the major tasks required to complete the evaluation on time and in budget, and to schedule those tasks to ensure that there is a smooth flow of activities.

13.2 *Tasks involved*

Typical tasks and sub-tasks may include:

<p><i>Evaluation design</i></p> <ul style="list-style-type: none"> • Meet with relevant stakeholders re evaluation purpose and scope • Finalise evaluation objectives and evaluation criteria • Complete evaluation plan • Review sources of advice and/or evaluation literature 	<p><i>Management</i></p> <ul style="list-style-type: none"> • Select/recruit evaluation team • Negotiate contract for external consultant • Conduct team meetings • Monitor budget expenditure • Purchase resources as needed
<p><i>Data collection</i></p> <ul style="list-style-type: none"> • Collect documents x, y and z • Conduct interviews/observations • Distribute questionnaires • Collect questionnaires • Provide suitable training for evaluators (if necessary) 	<p><i>Reporting</i></p> <ul style="list-style-type: none"> • Write interim reports • Prepare final report • Circulate draft report to stakeholders • Present final report
<p><i>Data analysis</i></p> <ul style="list-style-type: none"> • Purchase/obtain analysis tools if necessary (e.g. stats tools) • Verify and sort data • Enter, code, aggregate data 	<p><i>Evaluation of the evaluation</i></p> <ul style="list-style-type: none"> • Develop evaluation criteria • Finalise evaluation plan • Collect data • Conduct analysis

<ul style="list-style-type: none"> • Conduct analysis • Interpret the data • Communicate preliminary findings 	<ul style="list-style-type: none"> • Report/present findings
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[Adapted from Brinkerhoff, R.O., Brethower, D. M., Hluchyj, T. and Nowakowski, J. R. (1983). *Program Evaluation: A Practitioner's Guide for Trainers and Educators*. Design Manual, p.97. Kluwer.Nijhoff Publishing. Boston.]

Activity

A **Management Plan worksheet (Word)** is included in this kit. (Note: There are other ways to lay out a plan, and you can use project management software for this; e.g. Gantt or PERT charts. The advantage of these charts is that they allow you to better visualise task relationships, key milestones, and critical/busy times.)

Once you have developed your Evaluation Plan worksheet (see Section 11), you are in a position to begin filling out the various details on the management plan template.

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