# Framing Evaluation with the Right Plan
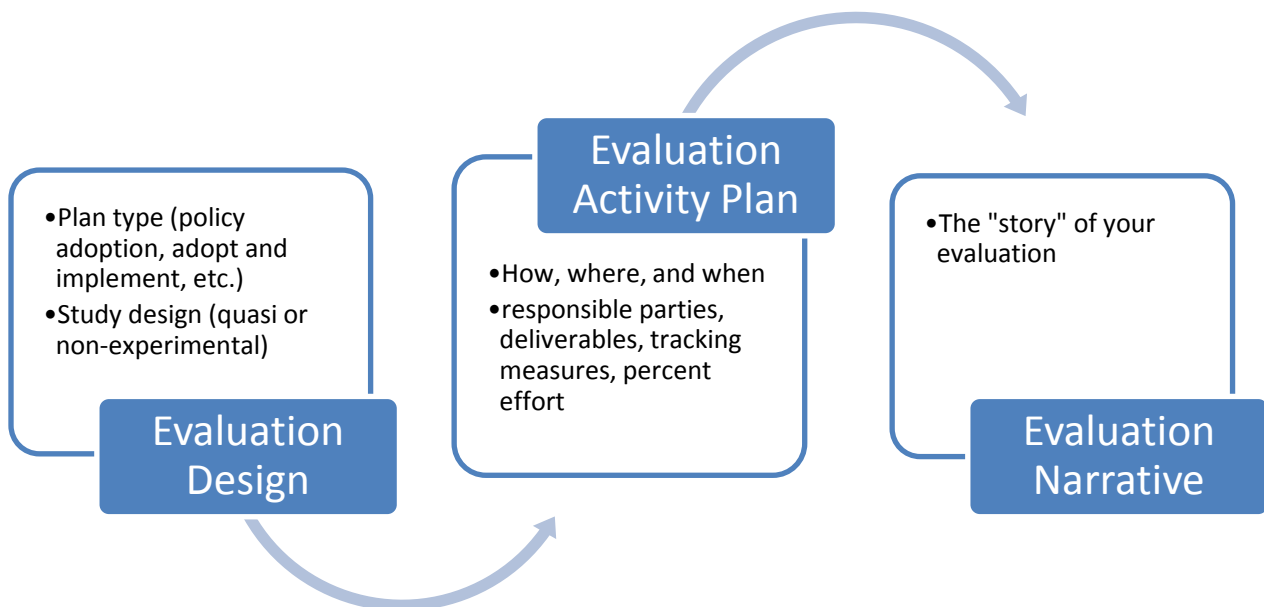
by Jeanette Treiber

Developing a useful evaluation plan is all a matter of getting the framing right. Once you do that, things begin to fall into place. It all starts with turning your end goal into a SMART objective. However, formulating a well-crafted objective takes practice, and formulating a plan where all of the pieces fit well together requires both programmatic and evaluative insight. Therefore, it's useful to involve an evaluator to help you think through the steps so that everything "hangs" together just right.
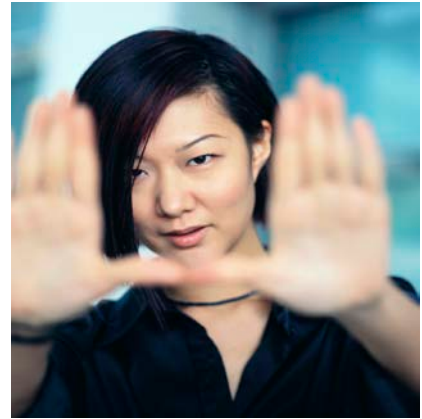
This process can take some time. As you create your 2013-2017 (phase II) scopes of work, make sure to include sufficient time to develop your evaluation plans. CTCP requires certification that your project received at least four hours of consultation from a registered local program evaluator as part of the proposal process. Whether your evaluator is internal or external, you need to work together closely to match the evaluation with your objective and intervention activities.

Instructions on how to write evaluation plans are provided in CTCP's LLA Guidelines Trainings recordings on the Partners website as well as in resources archived on the Tobacco Control Evaluation Center (TCEC) website.

Here is an easy-to-remember roadmap of the steps to take in your evaluation plan.

Evaluation Design
- Plan type (policy adoption, adopt and implement, etc.)
- Study design (quasi or non-experimental)

Evaluation Activity Plan
- How, where, and when
- responsible parties, deliverables, tracking measures, percent effort

Evaluation Narrative
- The "story" of your evaluation

Once you have formulated your objective, the evaluation plan begins to fall into place. Depending on what your end goal is, you'll want to match the right plan type to the wording of your objective.

Based on that, you will need process or outcome evaluation activities, or both. The figure below illustrates evaluation requirements for the different types of plans.

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                              ┌─────────────────┐      ┌─────────────────┐
                          ┌───│ Policy adoption  │──────│ Process          │
                          │   │                  │      │ evaluation       │
                          │   └─────────────────┘      └─────────────────┘
┌─────────────────┐       │   ┌─────────────────┐      ┌─────────────────┐
│ Voluntary/       │───────────│ Policy           │──────│ Outcome          │
│ legistative      │       │   │ implementation   │      │ evaluation       │
│ policies and     │       │   └─────────────────┘      └─────────────────┘
│ resolutions      │       │   ┌─────────────────┐      ┌─────────────────┐
└─────────────────┘       └───│ Policy adoption  │──────│ Process and      │
                              │ and              │      │ outcome          │
                              │ implementation   │      │ evaluation       │
                              └─────────────────┘      └─────────────────┘

┌─────────────────┐          ┌─────────────────┐
│ Other with       │──────────│ Outcome          │
│ measurable       │          │ evaluation       │
│ outcome          │          └─────────────────┘
└─────────────────┘

┌─────────────────┐          ┌─────────────────┐
│ Other without    │──────────│ Process          │
│ measurable       │          │ evaluation       │
│ outcome          │          └─────────────────┘
└─────────────────┘

┌─────────────────┐          ┌─────────────────┐
│ Individual       │──────────│ Outcome          │
│ behavior         │          │ evaluation       │
│ change           │          └─────────────────┘
└─────────────────┘
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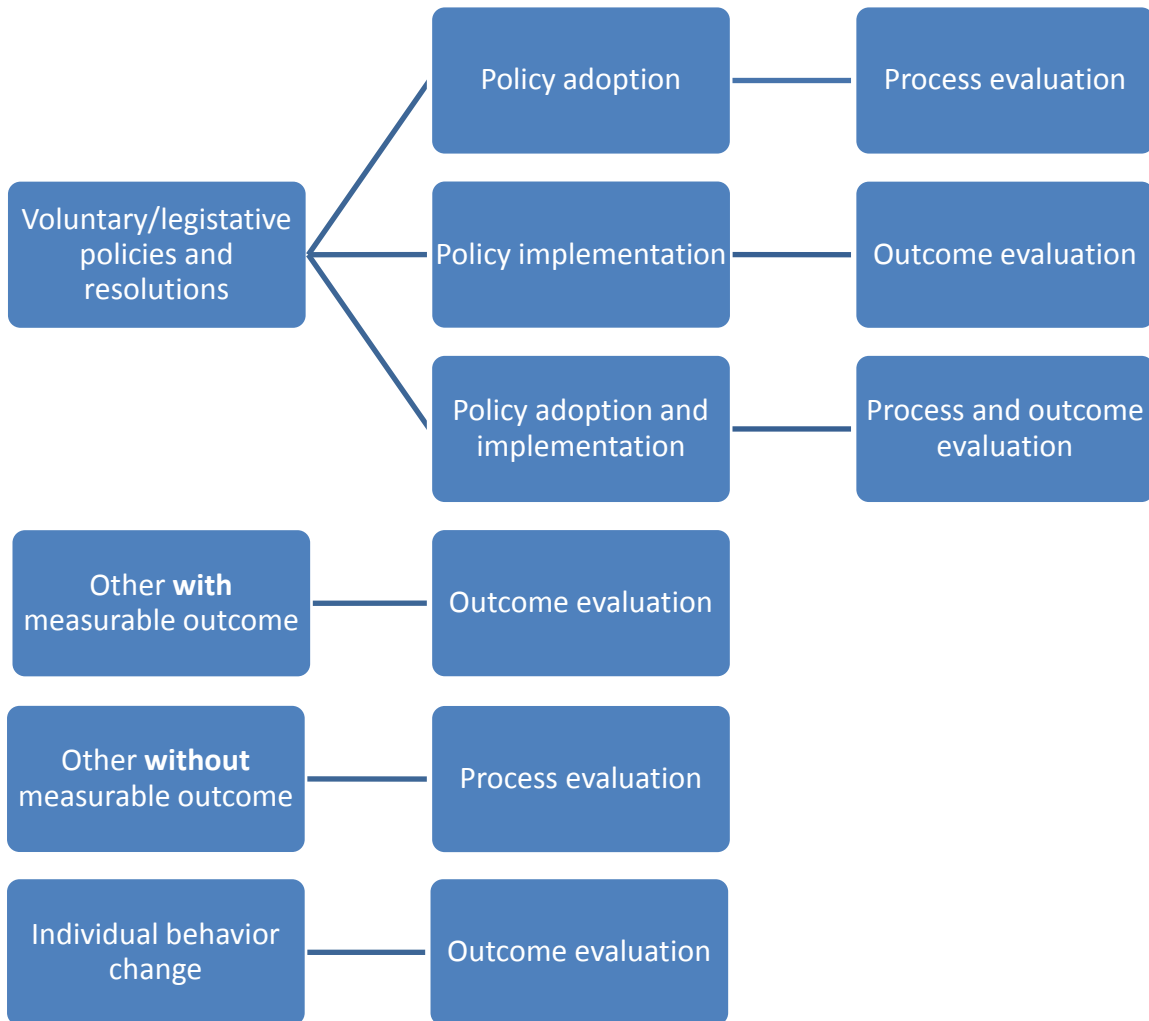
Outcome evaluations show how the project is having an effect. After a policy has been adopted, is there an observable change? This can be shown through pre- and post measures or with comparison groups. Process evaluations are designed to generate data that inform your campaign along the way and/or that demonstrate how the campaign unfolded. Both outcome and process evaluation designs may use surveys, observations, key informant interviews and other data collection methods. To get an idea of which type of data collection activities to use when, check out our resource Types of Data Collection Activities and Their Uses. It also can help to see what others have done, so in OTIS you can hunt for projects that have completed similar objectives and look at their plans. For directions on how to search for plans by indicator in OTIS, read this InfoHub post. You can also view sample plans on a select number of indicators on TCEC's website.

In the end, your goal is to collect data that will be useful to your project while keeping the evaluation manageable.