

# **EVALUATION NUTS** & BOLTS

Project Management and Budgeting Workshop

EDC AGEP ECBC Team

October 11, 20203



### Workshop Agenda

Approx. Start Time	Activity
8:30am	Welcome and Introduction
8:40am	Small Group Session #1: Project Management
9:00am	<ul> <li>Full Group Discussion #1</li> <li>Share out from small groups</li> <li>Hear about EDC team experiences</li> </ul>
9:15am	Small Group Session #2: Budgeting
9:35am	<ul> <li>Full Group Discussion #2</li> <li>Share out from small groups</li> <li>Hear about EDC team experiences</li> </ul>
9:50am	Wrap Up and Final Thoughts



### **Workshop Introduction**

**Goal:** provide space to workshop common components of evaluation planning with a focus on project management and budgeting.

Approach: small groups to review resources and offer peer-level feedback and discussion of strategies and tools to help manage this work.



### **Small Group #1 Instructions: Project Management**

- Review handouts
- Work through these strategies and discuss: ٠
  - Have you used these strategies before?
    - Were they helpful?
    - What were the biggest challenges?
  - What do you need to do implement these strategies?
  - What other tools/resources would you suggest?



### Getting Everyone on the Same Page

Practical Strategies for Evaluator-Stakeholder Communication

The slides and recording for this webinar are available at www.evalu-ate.org/webinar

### GOOD COMMUNICATION IS ESSENTIAL TO GOOD EVALUATION

Clarity of A Stakeholder buy-in A Utility of findings

### BEFORE EVALUATION BEGINS

- Prepare guestions to ask during the first meeting.
- Acknowledge the importance of both evaluation and project expertise
- Create a communication plan up front (see Communication Plan Checklist at.) bit.lv/checklist-commplant
- Present evaluation options in a budget menu
- Organize evaluation details in a matrix by evaluation guestions (see Evaluation Data Matrix Template at evalu-ate oro/resources/data-matrix

- THROUGHOUT EVALUATION
- Summarize your evaluation plan in a one-page cheat sheet (see blog on creating) a cheat sheet at evalu-ate.org/blog/Robertson-becho-oct18
- Send monthly email updates to avoid gaps in communication
- Share oreliminary results as soon and as often as possible

### AT THE END OF EVALUATION

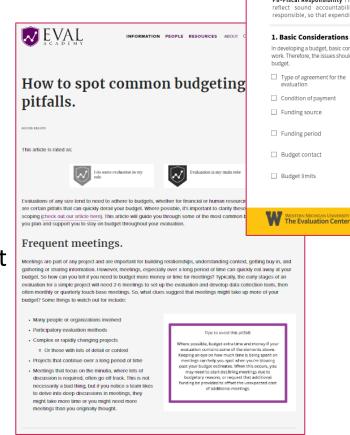
### Obtain client input on draft report outlines

- Ask reflective guestions when discussing report drafts
- Link conclusions and recommendations to evidence
- Document suggestions for future evaluations in recommendation section

# **FULL GROUP DISCUSSION 1**

### **Small Group #2 Instructions:** Budgeting

- Review handouts
- Work through the checklist and tips and discuss:
  - Does the checklist cover everything? ۲
    - What is missing?
  - Which pieces of budget development are the most ٠ challenging?
  - Can you relate to any of the common budgeting pitfalls?
  - What other budgeting pitfalls have you ٠ experienced?





This checklist is designed to assist evaluators and others think through the many issues that should be considered when developing an evaluation budget. This instrument is divided into several categories of typical cost items for conducting evaluations, and questions or statements are used as prompts for users to consider. In some cases, an item on the checklist may not be applicable. Full consideration should be given to the following two Program Evaluation Standards (Joint Committee, 1994) in all cases:

Jerry Horn

F3-Cost Effectiveness The evaluation should be efficient and produce information of sufficient value, so that the resources expended can be justified.

P8-Fiscal Responsibility The evaluator's allocation and expenditure of resources should reflect sound accountability procedures and otherwise be prudent and ethically responsible, so that expenditures are accounted for and appropriate.

### 1. Basic Considerations

In developing a budget, basic considerations or information will guide the form and nature of your work. Therefore, the issues should be known before attempting to construct either a preliminary or final

- Type of agreement for the Will this evaluation be funded by a grant, contract, or cooperative agreement?
  - Will payment be on the basis of cost reimbursement or a fixed price?

Is the funding source a government agency, private foundation, private sector business/industry, or nonprofit entity?

Over what period of time will the budget be applicable? Does this include more than one fiscal year?

Who are the designated contacts for budget matters in the funding organization and in the proposer's organization?

Has a limit for the evaluation budget been established, such as percentage of total budget or maximum amount?

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# **FULL GROUP DISCUSSION 2**

# Wrap Up

- Final Thoughts
  - Key takeaways?
  - Other comments?
- Resources
  - Handout: Additional project management and budgeting resources
  - ECBC Resources: <u>https://agep-ecbc.edc.org/resources/</u>
- Next Up:
  - 15-minute break
  - Research on Effective Communication with Alliances





## **THANK YOU**

Contact the AGEP ECBC team any time. AGEP ECBC@edc.org

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