

EDC

Education
Development
Center

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	Full Group Discussion #1 <ul style="list-style-type: none">• Share out from small groups• Hear about EDC team experiences
9:15am	Small Group Session #2: Budgeting
9:35am	Full Group Discussion #2 <ul style="list-style-type: none">• Share out from small groups• Hear about EDC team experiences
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:
 - 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?

EVAL ACADEMY INFORMATION PEOPLE RESOURCES ABOUT CONTACT

Project Management for Evaluation

ALICIA SALIDO

This article is rated as:

Evaluation is my main role

Sometimes managing evaluations can feel like herding cats. Despite your best efforts at nailing down methods, timelines, and other evaluation requirements, plans tend to change, especially aren't paying attention.

Evaluators work in multiple environments and just like there's no one-size-fits-all evaluation plan found there's no one-size-fits-all project management solution for managing evaluations.

Based on my experiences and as a self-proclaimed process geek, I've accumulated my top project management tools and strategies to help keep your evaluation projects on track and ensure they meet your stakeholder's needs.

First, there are project management tools – systems and processes that you can use to keep your evaluations on time and on budget.

Getting Everyone on the Same Page

Practical Strategies for Evaluator-Stakeholder Communication

May 2019 Webinar Handout
The slides and recording for this webinar are available at www.evaluate.org/webinars/may19

GOOD COMMUNICATION IS ESSENTIAL TO GOOD EVALUATION

- ↑ Clarity of expectations
- ↑ Stakeholder buy-in
- ↑ Utility of findings

Communication BEFORE EVALUATION BEGINS

- ✓ Prepare questions 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.ly/rchecklist-communication)
- ✓ Present evaluation options in a budget menu
- ✓ Organize evaluation details in a matrix by evaluation questions (see Evaluation Data Matrix Template at evaluate.org/resources@ata-matrix)

Communication THROUGHOUT EVALUATION

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

Communication AT THE END OF EVALUATION

- ✓ Obtain client input on draft report outlines
- ✓ Ask reflective questions when discussing report drafts
- ✓ Link conclusions and recommendations to evidence
- ✓ Document suggestions for future evaluations in recommendation section

This material is based upon work supported by the National Science Foundation under grant number 180592. Any opinions, findings, and conclusions or recommendations expressed in this material are those of the presenters and do not necessarily reflect the views of NSF.

www.evaluate.org **EVALUATE**

FULL GROUP DISCUSSION 1

Small Group #2 Instructions: Budgeting

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



Checklist for Developing and Evaluating Evaluation Budgets Jerry Horn

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:

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 budget.

- | | |
|---|---|
| <input type="checkbox"/> Type of agreement for the evaluation | Will this evaluation be funded by a grant, contract, or cooperative agreement? |
| <input type="checkbox"/> Condition of payment | Will payment be on the basis of cost reimbursement or a fixed price? |
| <input type="checkbox"/> Funding source | Is the funding source a government agency, private foundation, private sector business/industry, or nonprofit entity? |
| <input type="checkbox"/> Funding period | Over what period of time will the budget be applicable? Does this include more than one fiscal year? |
| <input type="checkbox"/> Budget contact | Who are the designated contacts for budget matters in the funding organization and in the proposer's organization? |
| <input type="checkbox"/> Budget limits | Has a limit for the evaluation budget been established, such as percentage of total budget or maximum amount? |



Jerry Horn
Western Michigan University - 2001

The screenshot shows the EVAL ACADEMY website with the article "How to spot common budgeting pitfalls." by Alicia Rallos. The article is rated as "I do some evaluation in my role" and "Evaluation is my main role". The article discusses common budgeting pitfalls and includes a section on "Frequent meetings." with a list of factors to watch out for, such as many people or organizations involved, participatory evaluation methods, complex or rapidly changing projects, and projects that continue over a long period of time. A callout box provides a tip to avoid this pitfall: "When possible, budget extra time and money if your evaluation contains some of the elements above. Keeping an eye on how much time is being spent on meetings can help you spot when you're blowing past your budget estimates. When this occurs, you may need to start declining meetings due to budgetary reasons, or request that additional funding be provided to offset the unexpected cost or additional meetings."

FULL GROUP DISCUSSION 2

Wrap Up

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





THANK YOU

Contact the AGEP ECBC team any time.

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