



JOHN REX ENDOWMENT

Project Evaluation

Upon receiving a John Rex Endowment grant award, agencies are required to submit a detailed evaluation plan at the beginning of the grant term (or, if applicable, at the end of a planning phase prior to implementation). Although this detailed evaluation plan is not required prior to an award decision, we provide our evaluation guidelines to inform your proposal development. In addition to the evaluation plan itself, consideration should be given as to whether the evaluation is best conducted by an internal or external party or both, and whether you have appropriately budgeted for evaluation activities.

Guidelines

An underlying philosophy that shapes our interest in evaluation is that it should be both useful and usable for agencies in measuring success and improving performance as they relate to the agency's mission and goals. Thus, evaluation plans should reflect realistic and measurable outcomes, delineating indicators that will demonstrate progress in achieving those outcomes in addition to methods for assessing the process and/or delivery of the project. By using an integrated approach to the evaluation of process as well as outcomes, we can answer both questions: did it work (or not)? and why did it work (or not)?

We strongly encourage the inclusion of key partner organizations in developing the evaluation plan. The format of the evaluation plan is flexible, and we welcome you to use formats that your agency uses internally or with other funders. At minimum, we ask that the evaluation plan include the following components:

- Short and long-term outcomes, with the specific indicators that you will use to measure progress towards those outcomes
- Which project activities relate to which desired outcomes
- Process-related measures for relevant project activities and components
- Specific methods you will use in both process and outcome evaluation
- Timeframe for evaluation activities (e.g., some evaluation activities will happen throughout the project, while others might only be conducted at the end of the project)

Upon submission of an evaluation plan, the John Rex Endowment will review and respond with any questions or comments. If needed, a meeting to discuss and finalize the plan may be scheduled.

Should you have any questions or need assistance while developing the plan, please do not hesitate to contact Kate (919-838-1183 or Kate@rexendowment.org).

The W.K. Kellogg Foundation website provides a guide (<http://www.wkkf.org/knowledge-center/resources/2010/W-K-Kellogg-Foundation-Evaluation-Handbook.aspx>) that you may find useful as you consider how to approach your project evaluation. Subjects include a section on planning an evaluation including budgeting for an evaluation and selecting an evaluator.

Another useful resource for working with an evaluation consultant is an evaluation contracts checklist (http://www.wmich.edu/evalctr/archive_checklists/contracts.pdf) developed by Western Michigan University's The Evaluation Center.