evaluation management process checklist



EVALUATION

TOOLKIT

ON

| Planning |  |
| --- | --- |
| Task/Milestone | Completed Date |
| Evaluability Assessment conducted (optional) |  |
| Decision made to undertake an evaluation |  |
| Evaluation Manager/Contracting Officer's Representative (COR) named |  |
| Evaluation parameters defined:   * What type (performance or impact) * Who will evaluate (external or internal evaluators) * When it will be completed |  |
| Mission-wide Performance Management Plan and/or Evaluation Registry updated |  |
| Initial evaluation communication and dissemination plan developed |  |
| Stakeholder engaged (including beneficiaries, local partners, implementing partners, and USAID and USG entities) to inform questions |  |
| Existing available and accessible data reviewed |  |
| Evaluation purpose and questions determined |  |
| Evaluation Statement of Work drafted |  |
| Evaluation Independent Government Cost Estimate (IGCE) drafted |  |
| Peer review of Evaluation Statement of Work |  |
| Final Evaluation Statement of Work approved |  |
| Mechanism selected (for external evaluations) |  |
| Solicitation issued (for external evaluations) |  |

| Managing |  |
| --- | --- |
| Task/Milestone | Completed Date |
| Technical evaluation of proposals (review) |  |
| Evaluation contract awarded (external) or evaluation team selected (internal) |  |
| Disclosure of Conflicts of Interest forms received |  |
| Post-award orientation (“Kick-off”) meeting |  |
| Evaluation workplan submitted |  |
| Evaluation background review/desk review/inception report submitted (if requested) |  |
| Evaluation design submitted |  |
| Evaluation design shared with country-level stakeholders and implementing partners for comment |  |
| Evaluation design approved |  |
| In-brief for Mission and/or Evaluation Stakeholders (if requested) |  |
| Mid-evaluation briefing/periodic briefing (if requested) |  |
| Out-briefing (if requested) |  |
| Submission of draft report |  |
| Peer review of draft report and draft report shared with implementing partner |  |
| Statements of Differences by funders, implementers and/or members of the evaluation team received |  |
| Submission of Final Evaluation report |  |
| Acceptance of Final Evaluation Report by USAID Mission/Operating Unit |  |
| Sharing, Reporting, Using, and Learning |  |
| Task/Milestone | Completed Date |
| Evaluation Report dissemination plan updated |  |
| Evaluation Report disseminated |  |
| Evaluation Report submitted to USAID Development Experience Clearinghouse |  |
| Evaluation data submitted to USAID Development Data Library (if applicable) |  |
| Evaluation contractor performance assessed in Contractor Performance Assessment Reporting System (CPARS) (if applicable) |  |
| Post-evaluation Mission review of findings, conclusions, and recommendations |  |
| Post-evaluation Action Plan approved |  |
| Actions in Post-evaluation Action Plan completed |  |
| Evaluation summary data entered into the Evaluation Registry of the Performance Plan and Report (PPR) |  |