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Guidelines for Working with Third-Party Evaluators – Evaluation Project Management Tools

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Exhibit 1. Evaluation Progress Checklist

Questions to Consider	Evaluation is On Target If… (one or more of the following may apply)	Evaluation is Experiencing a Challenge If… (one or more of the following may apply)
Timing and Deadlines		
(1) When did the third-party evaluator get hired?	☐ Third-party evaluator was hired prior to the project's first day of implementation ☐ Third-party evaluator was hired on schedule (according to the project management plan).	☐ The process for hiring the evaluator is more than one month delayed. ☐ The third-party evaluator is in the process of being hired or has not yet been hired.
(2) Is the evaluation meeting its deadlines?	☐ The evaluation has met all deadlines. ☐ The evaluation has met most deadlines, with 1 or 2 delays.	☐ The evaluation has not established any deadlines. ☐ There have been 3 or more delays in meeting deadlines.
Evaluation Planning and Design		
(3) Is the evaluation design complete?	☐ The plan contains most or all key elements.	☐ The evaluation does not have a plan or design. ☐ The evaluation plan is missing 3 or more elements.
(4) Was the third-party evaluator involved in the evaluation's design?	☐ The evaluator was involved with the evaluation design from the beginning. ☐ The evaluator reviewed a preexisting evaluation plan and is satisfied with it. ☐ The evaluator helped revise and refine a preexisting evaluation plan.	☐ The evaluator disagrees with or has expressed reservations or limitations for some or all elements of the plan such as evaluation questions, evaluation approach and methodology, data collection instruments, response rate, etc.
(5) Were evaluation questions finalized prior to data collection?	☐ The evaluation questions were finalized before data collection began	☐ The evaluation questions were being developed or revised after data collection began.
(6) Was the data analysis plan finalized prior to data collection?	☐ The data analysis plan was finalized before data collection began.	☐ The data analysis plan was being developed or revised after data collection began.
Communications		
(7) How frequently does the grantee communicate with the evaluator?	☐ Communication occurs according to the communication schedule. ☐ Communication occurs at least once a month.	☐ There is no communication schedule. ☐ Communication with the evaluator is sporadic. ☐ Communication is infrequent--it is difficult to get in touch with the evaluator.
(8) Is the grantee receiving key deliverables?	☐ Key deliverables are submitted on time and in the format expected. ☐ Key deliverables are generally submitted on time, with 1 or 2 delays or changes.	☐ The evaluation has not established any key deliverables. ☐ Products or deliverables are in arrears or do not meet expectations.
Data Collection		
(9) Does the evaluation have access to the desired participants and sites for data collection?	☐ Desired participants and sites are accessible (i.e., the evaluator can collect data on or from the participant or site).	☐ Only some of the desired participants or sites are accessible to the evaluator. ☐ None of the desired participants and sites are accessible to the evaluator.
(10) Are data collectors considered highly reliable?	☐ Data collectors were trained by qualified staff to high reliability. ☐ Data collectors all produced high inter-rater reliability (i.e. raters produced scores, observations, or assessments that are consistent with each other, indicating that data collectors all were collecting or scoring data in the same way). (*Note: inter-rater reliability may be assessed during training, during a pilot test, and/or during formal, non-pilot test, data collection.)* ☐ Data collectors were certified by instrument development staff.	☐ Data collectors were not trained. ☐ Data collectors failed to receive certification or high inter-rater reliability.
(11) Are desired populations responding to data collection (e.g., completing data collection) in sufficient numbers?	☐ The evaluation is on track to achieve a high (e.g., ≥70%) response rate on most data collection events.	☐ The evaluation is struggling to achieve a high response rate on one or more data collection events. ☐ The evaluation has failed to collect any data on one or more data collection events.

Exhibit 5. Evaluation Progress Checklist

Questions to Consider	Evaluation is On Target If… (one or more of the following may apply)	Evaluation is Experiencing a Challenge If… (one or more of the following may apply)
(12) Is the evaluation able to collect the data needed to answer the evaluation questions?	☐ Instruments are designed for or well-aligned to the evaluation questions. ☐ Most forms and instruments are completed or nearly completed.	☐ Instruments were chosen prior to finalization of evaluation questions. ☐ The evaluator did not review or approve final instruments. ☐ Many forms and instruments are returned with missing data.
Data Entry, Management, and Quality		
(13) Is data transfer and storage secure?	☐ Data collectors and evaluation staff follow a protocol for handling and transferring data securely. ☐ Data are kept in secure locations by qualified staff.	☐ There is no protocol for how to securely handle, transfer, or store data after collection. ☐ Data remain in an unsecure location with data collectors after a data collection event.
(14) Is there a system for organizing raw data? *Note: This may include specifications on how to compile data into a database, how to merge raw data files, etc.*	☐ Staff follow a protocol (e.g., instructions or guidelines) for organizing raw data after collection.	☐ There is no protocol for organizing raw data after collection. ☐ There is no means of checking which data have been collected or transferred to data entry staff. ☐ There is no means of tracking a data element used in analysis back to its "raw" form (e.g., data that have been re-coded or transformed for analysis cannot be tracked back to original format or value).
(15) Is there a system for cleaning, entering, and coding data? *Note: Cleaning data refers to the process of reviewing and resolving missing, incomplete, or inconsistent data*	☐ Trained staff check data for completeness, consistency, and legitimacy. ☐ The evaluation has a data definitions and coding manual. ☐ Trained staff perform data entry. ☐ Trained staff code all data as needed.	☐ The evaluation does not have a system for cleaning data. ☐ The evaluation does not have a data definitions and coding manual. ☐ There are no staff responsible for or trained in data entry. ☐ There are no staff responsible for or trained in data coding.
Data Analysis		
(16) Is analysis proceeding with high quality data?	☐ Staff follow a protocol for reviewing data quality prior to analysis. ☐ Staff create a file of high-quality data to be used for the analysis (which is separate from the original file or raw, uncleaned data).	☐ There is no protocol for data quality review. ☐ Analyses proceed before data collection is completed.
(17) Is there a system for making data available for analysis?	☐ Evaluation staff (either internal or external) follow a protocol for data export or transfer of data spreadsheets or files. ☐ Data always are transferred securely.	☐ There is no protocol for data export or transfer of files among evaluation staff (e.g., the staff who collect data, enter data, conduct data quality checks, and analyze data). ☐ Data are not transferred securely.
(18) Is there a comprehensive analysis framework that is guiding data analysis?	☐ Analyses are aligned with the evaluation questions.	☐ Staff "mine" the data for possible analyses.
Reporting		
(19) Are report templates in place?	☐ The evaluator works with the project to develop report templates. ☐ The evaluator uses funder's report templates.	☐ The evaluator has not received OSEP requirements or provided report templates..
(20) Are reported findings reliable and credible?	☐ Reporting of findings is based on high-quality data and analyses conducted by the third-party evaluator. . ☐ The third-party evaluator has authority to review and approve findings based on high-quality analysis conducted by the internal evaluator.	☐ The evaluation findings are not based on high-quality data or analysis. ☐ The grantee wants to "approve" the findings from the third-party evaluation before they are reported. ☐ The grantee will not allow the third-party evaluator to review some or all of the report, including findings reported by the internal evaluator.

Exhibit 2. Evaluation Close-Out Tasks

Close-Out Task	The grantee can…	The third-party evaluator can…
Complete all contracted items, including payments	☐ Review the contract and identify any outstanding contracted items. ☐ Develop a list of outstanding items to respond to, the order in which they can be addressed, and a timeline/deadline for addressing the items. ☐ Process any and all final invoices, per contracted terms.	☐ Review the contract and identify any outstanding contracted items. ☐ Submit any outstanding products or deliverables to the grantee. ☐ Submit a final request for payment or invoice, with a deadline for payment.
Ensure the receipt of all evaluation documents	☐ Review the evaluation documents received to-date, compare to the list of contracted deliverables, and create a list of documents that are outstanding. ☐ Remind the third-party evaluator that final payment may be delayed until all contracted documents are received.	☐ Review the evaluation documents produced to-date, compare to the list of contracted deliverables, and create a list of documents that are outstanding. ☐ Confirm with the grantee the documents that have been delivered to-date. ☐ Create a zip file, CD, or "thumb drive" with all evaluation materials and products. Ensure the secure transfer of the zip file, CD, or "thumb drive" to the grantee.
Establish a chain of communication for future information requests	☐ Establish, in writing, who will be responsible for handling future information requests. ☐ Provide contact information, including back-up contacts or contact information, in case the grantee cannot be contacted at his or her primary address, telephone number, cell phone number, or email address. ☐ Provide for or specifically exclude "extraordinary circumstances", in the event a funder or interested party cannot establish contact through the primary or secondary sources. *For example, if there are extraordinary circumstances, does the third-party evaluator have permission to respond to requests or should the interested party be routed to someone else in the grantee's agency?*	☐ Provide the grantee with primary and secondary contact information. ☐ Establish the length of time the third-party evaluator will be available for follow-up or requests for information.
Complete the transfer of or destruction of data and files	☐ Compile a list of all data and files the project will maintain in-house. Similarly, compile a list of all data and files that will be maintained by the third-party evaluator and a list of all data and files that are to be destroyed. *Note—the project may be required to maintain evaluation records (including data) for three or more years—OSEP and the grantee's agency may have different requirements.* ☐ Assign a staff person to oversee secure transfer of data and files. ☐ Assign a staff person the responsibility of secure in-house storage or destruction.	☐ Ensure all data and files that are transferred to the project or maintained in-house are scrubbed of identifying information (as appropriate) and transferred securely and completely. Receive a written receipt that details all data and files received, the date received, and the person who received the data and files. ☐ At the appropriate time, contract with or utilize available data and file destruction services. Maintain records of how and when data and files were destroyed. Provide copies of these records to the grantee, as required.

Appendix B. Evaluation Needs Assessment Template

Question	Check the best option…	Possible Third-Party Evaluator Tasks

(1) Does the project already have an evaluation plan (a description of the evaluation questions, data collection tools and methods, analysis approach, and reporting requirements)?
 	
Note: Very often projects have some or all of an evaluation plan in place but the plan requires review or revision after a project is funded.
	☐ Yes, there is a complete evaluation plan in place, which responds in full to the evaluation requirements—**proceed to question 2. If you want to double check your answer, complete the checklist at right to identify possible third-party evaluator tasks**
	
	☐ There is a plan, but I'm not sure if it is complete or if it responds to requirements in full— **complete the checklist at right to identify possible third-party evaluator tasks**
	
	☐ No— **complete the checklist at right to identify possible third-party evaluator tasks**
		☐ Create or review the comprehensive evaluation plan; **OR**
		☐ Review, develop, or refine formative evaluation questions
		☐ Review, develop, or refine summative evaluation questions
		☐ Identify or review data collection sources
		☐ Identify or review data collection instruments
		☐ Create/pilot test data collection instrument(s)
		☐ Design data collection procedures
		  ☐ Implementation progress monitoring
		  ☐ Service statistics (e.g., numbers served; numbers of services provided)
		  ☐ Fidelity of implementation
		  ☐ Outcomes/impact data
		☐ Design data entry/ management procedures
		☐ Create data analysis plan
		☐ Design or review evaluation budget
		☐ Design or review report template(s)

(2) Are there internal staff with skills necessary to conduct the evaluation?
 	
Note: Very often projects will ensure statisticians and qualitative specialists (team members who specialize in qualitative research) are available to work on or support the evaluation.
	☐ Yes, internal staff are qualified for the types of evaluation required--**check off the applicable and needed skills below and proceed to question 3**
	  ☐ Formative evaluation—the evaluation will collect data on implementation progress and provide periodic feedback to project implementers to support project improvement
	  ☐ Measuring Fidelity of Implementation—the evaluation will collect data on implementation of the core components of the project, measure fidelity to the proposed theory of change, create and assign fidelity scores, and determine the level of component-level and overall fidelity of implementation
	  ☐ Experimental design—the evaluation will collect data on individuals randomly assigned into treatment and control groups; the evaluation will rigorously monitor treatment and control group conditions over the duration of the project
	  ☐ Quasi-experimental design—the evaluation will collect data on individuals placed into treatment and comparison groups by the evaluator; the evaluation will rigorously monitor treatment and comparison group conditions over the duration of the project
	  ☐ Non-experimental—the evaluation will collect data on the treatment group; a comparison group may be created post hoc (the evaluation will not track comparison group conditions over the duration of the project)
	  ☐ Design and implementation of a sampling plan—the evaluation will design a sample that is sufficient for the evaluation's approach, methodology, and analysis framework. The evaluation will identify how to treat sampled data (e.g., establish sample weights and any limitations on interpretation of data)
	
	☐ Unsure or No — **complete the checklist at right to identify possible third-party evaluator tasks**
		☐ Conduct formative evaluation activities
		☐ Conduct study of fidelity of implementation
		☐ Implement experimental or quasi-experimental design study (evaluator should have advanced background and expertise or training in sampling, research methodology)
		☐ Implement non-experimental study (evaluator should have basic background and expertise or training in research methodology)
		☐ Design and implement a sampling plan

Appendix B. Evaluation Needs Assessment Template

Question	Check the best option…	Possible Third-Party Evaluator Tasks
(3) Can internal staff be sufficiently allocated to perform all evaluation tasks and responsibilities?	☐ Yes—**proceed to question 4** ☐ Unsure or No — **complete the checklist at right to identify possible third-party evaluator tasks**	☐ Create/pilot test data collection instruments ☐ Collect data on ☐ Implementation progress ☐ Service Statistics (e.g., numbers served; numbers of services provided) ☐ Fidelity of implementation ☐ Outcomes/impact ☐ Perform data entry/management ☐ Conduct data analysis ☐ Provide performance feedback to project team ☐ Write reports ☐ Other: _____
(4) Can internal staff perform all evaluation tasks and responsibilities objectively and without jeopardizing the credibility of evaluation findings?	☐ Yes—**proceed to item 5** ☐ Unsure or No — **complete the checklist at right to identify possible third-party evaluator tasks**	☐ Collect data on ☐ Implementation progress ☐ Service Statistics (e.g., numbers served; numbers of services provided) ☐ Fidelity of implementation ☐ Outcomes/impact ☐ Perform data entry/management ☐ Conduct data analysis ☐ Provide performance feedback to project team ☐ Write reports ☐ Other: _____
(5) NEEDS ASSESSMENT COMPLETED • If the answer to all questions is "yes", the project may not need a third-party evaluator. • If the answer to one or more questions is "unsure or no," the project may benefit from hiring a third-party evaluator to perform specific tasks, as identified in this assessment.		

Appendix C. Budgeting Guidance

Questions to Guide Budgeting	Staffing Considerations	Time Considerations	Tips
Timing and Deadlines			
How much of the project evaluation will be assigned to a third-party evaluator?	• Deciding to use a third-party evaluator may add costs to the budget. *Note: The third-party evaluator will likely provide a time and budget estimate for his or her work.*	• Working with a third-party evaluator requires additional time in the form of communications, oversight, and contract management.	• Projects frequently budget for the following evaluation staff: ○ Project Director and/or Principal Investigator ○ Administrative Assistant and/ or Project Manager ○ Data collectors ○ Data entry staff/ data technicians ○ Third-party evaluator
If the project already has started, is the evaluation behind schedule on specific tasks?	• If the project is behind schedule when budgeting or budget revisions are calculated, grantees may consider adding staff to ensure evaluation tasks are completed in a timely fashion.	• If the project is behind schedule, grantees may need to allocate additional (often unbudgeted) hours so that evaluation tasks can be completed on schedule. This is especially important when data have to be collected within a specific time frame (e.g., if observational data must be completed before state testing starts in schools).	• Projects can easily fall behind schedule if the evaluation planners underestimate the amount of time necessary to complete specific tasks. For example, if the evaluation budget allocates 1 hour for collecting interview data but spends more than 1 hour to complete data collection, the evaluation may fall behind schedule and over-budget on that data collection task.
Evaluation Planning and Design			
Is the evaluation design complete when the project is funded?	• If the design is not complete, allocate time for staff (either internal or third-party) to review and complete the design.	• The amount of time needed will be related to the complexity of the evaluation approach. For example, a complex, long-term, experimental design may require more time to complete than a relatively simple, short-term, non-experimental design.	• Grantees may submit evaluation ideas or a draft evaluation plan with their applications. However, grantees may want to allocate staff and time to a review of the evaluation design after funding is approved. This may be necessary if OSEP has provided comments specific to the evaluation.
How many evaluation questions are there? *Note: The number of questions may be the first indication of the complexity and intensity of an evaluation.*	• The evaluation should have sufficient staff to fully implement all the evaluation activities in a timely fashion—ensuring all data are collected, analyzed, and reported within any required timeframes.	• The number of evaluation questions can impact the total time allocation since each evaluation question may require independent training of staff, data collection, data entry, etc.	• Create a complete evaluation approach for each question: Is the question experimental, quasi-experimental, or non-experimental in design? What is the means of data collection? Who will collect data, enter and manage data, and complete analyses and reporting? Consider working with a third-party evaluator to review and complete the evaluation design. • Evaluation reporting often takes longer than expected. Plan to create draft evaluation reports and allow time for review and revisions. • Plan evaluation reports to align with OSEP-required reporting periods so that the evaluation feeds into OSEP reports.
For each evaluation question, what is the evaluation approach or design?	• Some designs (e.g., those that incorporate sampling or require substantial qualitative data collection) will need staff with training and experience in specific research methodologies.	• Evaluations that specify "changes", such as achievement gains, or change over time, will require at least two data collections. • Evaluations with many variables or possible explanations for observed changes may require more extensive or time-consuming data collections. •	• Create a logic model or set of hypotheses for how the project will achieve its desired outcomes. Identify the possible explanatory or confounding variables and make sure there is a reliable, high-quality data source for each variable.

Appendix C. Budgeting Guidance

Questions to Guide Budgeting	Staffing Considerations	Time Considerations	Tips
Communications and Management			
How frequently are communications planned?	• Grantees should identify a project liaison responsible for on-going communication with the evaluator and clearly identify how much other project staff will be involved with communications.	• More frequent communications will require more staff time. • Evaluations experiencing challenges may require more frequent communications.	• At a minimum, projects should plan for monthly, 1-2 hour communications. • Expect total communication frequency and duration to vary over the course of the project, with more communication usually taking place during the beginning and ending phases of the evaluation and whenever data collection occurs. • If an evaluation is experiencing challenges, grantees may need to add communication opportunities to the budget.
How frequently will the project monitor the evaluation?	• Grantees should identify a project liaison responsible for monitoring evaluation tasks and clearly identify how much other project staff will be involved with monitoring.	• Grantees may need to allocate time for developing a monitoring protocol or template, if one does not exist. • More frequent monitoring will require more staff time. • Evaluations experiencing challenges may require more frequent monitoring.	• The timing and duration of monitoring may vary across different phases of the evaluation. • Monitor data collection events during or directly after they occur to ensure the evaluation is achieving a sufficient quantity of valid and reliable data. • If an evaluation is experiencing challenges, grantees may need to add more monitoring opportunities to the budget.
Data Collection			
What types of data collection are expected (e.g., survey, interview, focus group, observational, and achievement data)?	• Evaluations that incorporate more than one type of data collection (e.g., collection of standardized assessment data, survey data, or interview data) may require staff with experience and training in specific techniques.	Different types of data collections require different amounts of time to complete. For example, assessments, surveys, and interviews will vary in length. Obtaining standardized data from a partner such as the local education agency may require a significant investment of time over one or more months.	• Consider utilizing at least two methods of data collection to answer evaluation questions—for example, interviews and standardized assessment data. This provides a richer range and scope of data.
How much data will be collected?	• If large amounts of data are to be collected, it may be necessary to budget for additional staff to conduct data collection activities in various locations simultaneously or to collect data multiple times over an extended period of time. • The amount of data to be collected can be influenced by whether or not the project uses sampling. Projects that use sampling may require staff with training and experience in sampling techniques.	• Large-scale data collections require larger time allocations.	• Consider including design and implementation of a sampling framework in the third-party evaluator scope of work and qualifications. • Determine the sample size as early as possible to adequately budget data collection time.
How frequently will data be collected?	• Evaluations with frequent data collections may require a larger data collection team to complete all of the data collection activities on time.	• Each data collection should require the same time "per unit" (e.g., per survey, per data export), although initial data collections sometimes require more time.	• Track and calculate data collection metrics. Calculate total and per unit data collection time and compare to budgeted estimates. Use findings to revise time allocations, as necessary and possible, for future collections. This may require budget changes.

Appendix C. Budgeting Guidance

Questions to Guide Budgeting	Staffing Considerations	Time Considerations	Tips
Are established instruments in place or do instruments need to be developed?	• Staff should be qualified to identify whether existing instruments can be appropriately used to respond to the evaluation questions. • If the project does not plan to use an existing instrument, it may be necessary to identify staff qualified in creating data collection instruments.	• Choosing or creating data collection instruments can be time consuming since evaluations often require multiple instruments to answer different evaluation questions. • Instrument creation generally requires substantially more time than choosing an existing, valid, and reliable instrument.	• Allocate time for reviewing existing instruments for validity and reliability for the project evaluation. • Evaluators commonly underestimate the amount of time needed to develop and refine a new data collection instrument; allocate plenty of time for this (if needed). • If the project plans to use a published instrument(s), include the costs of the instrument's data collection forms, scoring guidelines, technical manual, and other necessary tools in the evaluation budget.
Will there be a pilot test? *Note: Pilot tests are "dry runs" of the instrument in its desired context.*	• If data collection instruments will be created for the evaluation, it may be necessary to identify qualified staff to conduct a pilot test for validity and reliability.	• If data collection instruments will be created for the evaluation, it may be necessary to allocate staff time and compensation for pilot testing, (i.e., recruiting pilot testers, conducting the test, analyzing the results, and making changes to the instruments).	• Allocate as much if not more time for the pilot test as for non-pilot data collections.
Will data collectors be trained to high levels of inter-rater reliability?	• Evaluations should use data collection staff that produce highly reliable results. It may be necessary to identify staff who are experienced in training data collection staff to high reliability. • Data collection staff should be trained to reliably use the instruments. Thus, if existing staff are not trained, they should receive training to ensure a high degree of reliability of the data collected.	• It may be necessary to allocate time for staff training and reliability testing on each of the evaluation's instruments. • Evaluations that incorporate multiple instruments may need to provide multiple trainings for data collection staff. • It may be necessary to allow time to create a training protocol, if one does not already exist (e.g., if the project is creating a data collection instrument).	• Publishers of existing instruments often require and provide training to ensure high reliability of the data collection. Check with the instrument's publisher to determine the training requirements. • Consider allocating time to conducting reliability checks on data.
Data Entry, Management, and Quality			
Who will enter data?	• Evaluations typically employ data technicians for data entry. • It is helpful to identify whether staff require training or specific qualifications to enter data.	• It may be necessary to allow time to create a data entry protocol, including a variable dictionary and data codes. • It may be necessary to allow time for training in data entry.	• Whenever possible, do not use "higher level" staff such as the project director or principal investigator for data entry. • Data technicians should be competent in word processing and spreadsheet programs.
How much data will be entered?	• If large amounts of data need to be entered in a relatively short amount of time, a larger data entry team may be required.	• Large-scale data collections (and longer data collection instruments) require larger time allocations. *Note—this assumes the initial data collection estimate is correct.*	• Track and calculate data entry metrics. Calculate total and per unit data entry time and compare to budgeted estimates. Use findings to revise time allocations, as necessary and possible, for future data collections. This may require changes to the budget.

Appendix C. Budgeting Guidance

Questions to Guide Budgeting	Staffing Considerations	Time Considerations	Tips
Is a data management system in place or will one need to be constructed?	• Staff with training and experience in creating data management systems may be needed to create the spreadsheet or database that will house the data.	• Allow time for identifying or creating a data management system that will capture all data necessary to complete the evaluation's analyses. • Relatively complex evaluations may require relatively complex data systems (e.g., that allow multiple collectors to enter data simultaneously or remotely).	• Plan to enter data following each data collection event. • Plan for a means of linking data across data collection events (e.g., use of unique identifiers).
Are protocols for data entry, coding, management and quality checks in place or do they need to be developed?	• Qualified staff should be responsible for managing data entry and coding and reviewing data for quality.	• Allow time for data quality checks and management of the data entry and coding process.	• Plan to generate descriptive statistics to review data for data quality after the data have been entered. • Plan to review spreadsheets or databases for missing data and outliers.
Will data entry be checked for errors?	• Qualified staff should conduct data checks to ensure data entry contains minimal or no typographic or clerical errors.	• Allow time to check for data entry errors.	• Plan to select a random sample of data that has been entered to review for data entry errors—compare data that is entered to the original, raw data.
Data Analysis			
Is a data analysis plan or protocol in place or does one need to be developed?	• Qualified staff should be responsible for creating a data analysis framework that appropriately addresses all evaluation questions.	• Allow sufficient time to create and revise the analysis framework as the evaluation proceeds.	• Plan to revisit and revise the analysis framework (the expected process and sequence of data analysis) at least once during an evaluation.
Are there qualified staff to conduct data analyses?	• Evaluations with experimental and quasi-experimental designs, as well as those that incorporate sampling, require staff with statistical training and experience. • Evaluations with qualitative elements (e.g., case studies) require staff with specific training and experience in qualitative methods.	• Allow sufficient time for a complete data analysis for each evaluation question. Quantitative and qualitative analyses both can be very time consuming—the project may find it helpful to consult with a third-party evaluator, statistician, or qualitative specialist to determine the amount of time necessary for analyses.	• Complete an analysis framework for each question that identifies the steps and estimated time necessary to complete the data analysis. • Include the costs of consulting with a third-party evaluator, statistician, or qualitative specialist in the evaluation's budget.
Will analyses be reviewed within the team?	• Staff who will be responsible for reviewing the analyses should be able to assess whether they are appropriate for the type of data and the evaluation question, and determine if the findings are accurate.	• It may be necessary to allow time for different types of analyses to be confirmed by different staff members.	• Plan to have a second staff member review the more complex analyses—or analyses that incorporate advanced statistical techniques.

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Questions to Guide Budgeting	Staffing Considerations	Time Considerations	Tips
Reporting			
How many reports/products are expected (e.g., technical report, policy brief, PowerPoint presentation)?	• Specific products may require staff with specific skills in preparation or editing (e.g., in making documents Section 508 compliant).	• Allow sufficient time for writing, review, and revision of each product. It may be helpful to consult with a third-party evaluator, statistician, or qualitative specialist to determine the amount of time necessary for thorough reporting.	• Include extra time for reporting in the project timeline and budget—it usually takes longer than expected. • Include the costs of consulting with a third-party evaluator, statistician, or qualitative specialist in the evaluation's budget.
Are report templates in place or do they need to be developed?	• It may be helpful to make a qualified and knowledgeable staff person responsible for developing report templates that meet specific requirements.	• It may be necessary to allow time for developing and receiving approval from project managers on draft report templates.	• OSEP provides an Annual Performance Report template. • The project may want to produce additional reports, for varied audiences.
Who will write and who will review the report(s) and product(s)?	• It may be helpful to identify ○ the staff who are qualified and who will be responsible for <u>writing</u> the report(s). ○ the staff who are qualified and who will be responsible for <u>reviewing</u> the report(s).	• Allow sufficient time for report writing and report review. • Allow time for report revisions. • More complex evaluations, with a larger number of evaluation questions, likely will require a larger time allocation for report writing and review.	• Allocate at least 2 days (each) for report writing, review, and revision for each evaluation question. • Allocate additional time for the report's introduction and conclusion. • Allocate additional time for submission of various drafts of reports for feedback, as needed. • Time the evaluation's report writing to align with required OSEP reporting so that the evaluation findings can feed into any required reports.