**Performance Monitoring and Program Report: Evaluation and Performance Measurement Plan Template**

***Instructions****: Use this evaluation plan template as a guide when thinking through how you would like to evaluate your project. You do not need to complete sections of this template that are not relevant to this CDC-funded project. Collaborate with your Project Officer or Technical Monitor to edit or adjust this template as needed to suit the needs of your organization. Please reference the* [*CDC Evaluation Framework*](https://www.cdc.gov/evaluation/framework/index.htm) *for additional tips and resources. Sections relevant to your Notice of Award should match accordingly, e.g. Funding Period and A1.1 Title of project. Please note that the text in blue represents an example response to use as a guide for completing the Evaluation Plan. Please delete the blue text ahead of submitting the Evaluation Plan.*

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| **1**. **Federal Agency, Center, and Division to which this Report is being**  **Submitted** | **2**. **Federal Notice of Funding Opportunity (NOFO) or Other Identifying Funding Mechanism Number Assigned by Federal Agency** | **3. Name of Submitting Organization** | **4. Funding Period** |
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**A. Overview and Planning**

**A1. Evaluation Plan Overview**

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| **A1.1. Description of Project:** Provide the title of your project and a brief overview of your project. |
| **A1.2. Strategies and Activities to Evaluate***:* Select strategies from your workplan and/or the Cooperative Agreement you would like to evaluate during the funding period. You may add more than three strategies by copying/pasting below strategy 3. For each strategy, include one or more related activities and population(s) of focus. You may copy directly from the workplan/CoAg, or you may choose to add specificity to the strategies here. You may also work with collaborators (A2) to think about activities that could be evaluated.   * **Strategy 1:** [Insert strategy]   + **Population of Focus**: [Insert population(s) of focus]   + **Activities:**     - [Insert corresponding activities] * **Strategy 2:** [Insert strategy]   + **Population of Focus**: [Insert population(s) of focus]   + **Activities:**     - [Insert corresponding activities] * **Strategy 3:** [Insert strategy]   + **Population of Focus**: [Insert population(s) of focus]   + **Activities:**     - [Insert corresponding activities] |
| **A1.3. Overall Evaluation Approach and Context:** Describe the general approach that you will undertake to evaluate these strategies (what do you hope to answer through your evaluation of this project?). If your organization is continuing previous work, how will your strategies/activities improve and expand on your prior work? If this is a new project for your organization, how will your strategies/activities lead to your intended outcomes? |
| **A1.4. Use of Evaluation Findings:** Describe how your evaluation findings will be used to support continuous quality and programmatic improvement.  Findings will inform revision of project methods and promising practice strategies. For example, identifying communities that need services brought to them. |

**A2. Table for Interested/Impacted Party/Partner Assessment and Engagement Plan *(Optional)***

***Instructions:*** *In this section, include people, communities, or organizations who have a major interest and role in the project. You do not need to complete all rows. Please include details that demonstrate how the people, communities, or organizations listed can help your evaluation needs or would be interested in or impacted by the project’s outcomes. You may also work directly with collaborators on sections of the evaluation plan, such as thinking through activities (A1.2).*

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| **A2.1. Collaborator/Partner Name** | **A2.2 Interest or Perspective** | **A2.3. Role in the Project and Evaluation**  *In addition to their primary role, please share whether they are a decision-maker, lead a component of the project, etc.* |
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**A3. Logic Model**

***Instructions:*** *Provide a logic model (including resources/inputs, activities, outputs, short, intermediate, and long-term outcomes) for the immunization program that is being evaluated. Consider your population(s) of focus, especially in reference to outcomes (who are you aiming to support? who do you want the program to impact?).* ***You may use the table below to develop a new Logic Model based on your workplan, or you may submit an existing Logic Model that includes these categories. Please view*** [***CDC Evaluation Brief 2 - Logic Model Basics***](https://researchdemystified.org/wp-content/uploads/sites/3/2010/01/CDC-logic-model-brief-2.pdf) ***and a*** [***CDC Logic Model Example***](https://www.cdc.gov/tb/programs/evaluation/logic_model.html) ***for additional guidance .***

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| **A3.1. Resources/Inputs** | **A3.2. Activities** | **A3.3. Outputs** | **A3.4. Outcomes** | | |
| *What resources are available to support what is being evaluated (e.g., staff, funding, space, time, partnerships, technology, etc.)?* | *What specific activities are undertaken (or planned) to achieve the outcomes? Activities may correspond to the activities listed in A1.2* | *What products (e.g., presentation, training, toolkit, etc.) are produced by your staff as a result of the activities performed?* | *What are the program’s intended outcomes? What are your desired changes or impacts that this project is hoping to achieve? The intended outcomes can be short-, intermediate-, or long-term. (The examples in parentheses below are for a 3-year CoAg)* | | |
|  |  |  | Short-term (e.g., year 1) | Intermediate-term (e.g., year 2) | Long-term (e.g., year 3) |
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**B. Evaluation Design**

***Instructions****: Pull strategies (one strategy per row) and activities from A1.2 to outline how you will conduct your evaluation.*

**B1. Evaluation Design and Data Collection Matrix**

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| **B1.1. Strategy** | **B1.2. Activity(s)** | **B1.3. Evaluation Design** | **B1.4. Data Collection**  **Method** | **B1.5. Data Analysis** |
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| *Please reference the strategies from your workplan and/or the Cooperative Agreement.* ***You may copy directly from A1.2.*** | *Please reference the activities from your workplan and/or the Cooperative Agreement.* ***You may copy directly from A1.2*** | *What type of design will you use to evaluate this strategy/activity? This could be a pre/post survey, tracking number of people reached, focus groups, etc.* | *How you will collect the data (i.e., abstraction from records, database, survey etc.)?* | *What type of analysis will you apply to the data (i.e., descriptive statistics, thematic analysis)?* |
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**C. Performance Measurement Plan**

**C1. Performance Measurement Plan**

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| **Performance Measurement Plan Narrative** | | | | | | | | |
| **C1.1. Ensure Data Quality:** Describe your plans for assessing the validity, accuracy, and consistency of your performance measurement data. A brief summary is sufficient, but you may elaborate when helpful. | | | | | | | | |
| **C1.2. Indicators for Outcomes** | | **C1.3. Baseline** | **C1.4. Year [1] Target** | **C1.5. Year [X] Target** | **C1.6. Year [X] Target** | **C1.7. Data Source** | **C1.8. Frequency of Data Collection** | **C1.9. Measurement Notes** |
| *Enter each relevant indicator (for an outcome) based on program guidance and your workplan. You may also think of these indicators as outcome measures. If relevant, include whether you are tracking an average, percent increase, or another measure.* | *Please reference the CoAg and associated data sources for your project. Please contact your Project Officer for additional support.* |  |  |  | *How you will collect the data (i.e., project records, surveys,*  *etc.)?* | *How often you are collecting data for*  *this performance measure?* | *Describe any notes about data*  *measurement.* | |
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**D. Barriers and Facilitators**

**D.1. What are some barriers to completing evaluation (funding or resources to support evaluation, skillsets of staff, etc.)?**

**D.2. What are some facilitators to completing evaluation (allotted money in budget, staff designated for evaluation, etc.)?**

**E. Evaluation Budget *(Optional)***

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| **E.1. Expense (items, staff, other resources)** | **E.2. Projected Cost** |
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**E.3. What is the total expected cost for the evaluation? *(Consider potential need to hire one or more people to execute the evaluation plan outlined above)***

**E.4. Have you budgeted for these costs in your overall project budget?**

**E.5. Are any in-kind, volunteer, or partner resources being contributed?**