FREE TEMPLATE

Evaluation Plan Template for Grants (Free PDF)

A fillable evaluation plan with evaluation questions, a data collection table for each objective, roles, a reporting plan and a fictional worked example.

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> An evaluation plan tells a funder how you will know whether the project was delivered as planned and whether it made a difference. Use this template to plan one measure at a time. If your funder gives its own evaluation form, required indicators or page limit, follow theirs first and copy your content across.

Project details

Project title:

Organization:

Funder:

Grant period (start and end dates):

Person responsible for the evaluation:

Process measures and outcome measures

A complete plan has both kinds of measure. Reviewers often mark a plan down when it only counts activity.

Type	What it tells you	Typical question	Typical measures
Process measure	Whether the project was delivered as planned	Did we do what we said, for the people we said, on time?	Sessions held, people enrolled, attendance, completion, participant feedback
Outcome measure	Whether anything changed for the people served	What is different because of the project?	Change in knowledge, skills, behavior, status or conditions

A quick test: if the number would look the same whether or not participants benefited, it is a process measure.

Evaluation questions

Write two to five questions the evaluation will answer. Include at least one about delivery and one about results.

Process question 1:

Process question 2:

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Outcome question 1:

Outcome question 2:

Other question, if the funder asks for one:

Data collection table

Complete one row for each indicator. Start from the objectives already in your proposal and use the same wording.

Objective	Indicator	Data source or tool	Who collects	When

What goes in each column

Column	What to write
Objective	The measurable objective from your proposal, word for word
Indicator	The specific number or observation that shows progress on that objective
Data source or tool	Where the information comes from: sign-in sheet, survey, test, record review, interview
Who collects	A role, not just a name, so the plan survives staff changes
When	The points in time: at enrollment, each session, at the end, at follow-up

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Worked example

This example is fictional. The Example Family Literacy Center and all of its figures are invented to show the level of detail to aim for.

Objective	Indicator	Data source or tool	Who collects	When
Enroll 60 parents in the 12-week program by the end of month 3	Number of parents enrolled	Enrollment forms	Program Coordinator	Weekly during months 1 to 3
Hold 24 class sessions with average attendance of at least 75 percent	Sessions held; share of enrolled parents attending each one	Sign-in sheets	Class instructor	Every session
70 percent of parents who complete the program read with their child at least four days a week	Days per week of shared reading reported by each parent	Parent survey with the same question each time	Program Coordinator	At enrollment and in week 12
60 percent of completing parents improve their score on the reading skills check	Change in score from first to last check	Skills check chosen by the program	Class instructor	Week 1 and week 12

The first two rows are process measures. The last two are outcome measures, and each one has a starting point to compare against.

Baseline and targets

Where each starting figure comes from, and the date it was measured:

How each target was set (past results, a similar program, funder requirement):

Roles

Role	Name or position	What they do in the evaluation
Evaluation lead		
Data collection		
Data entry and storage		
Analysis		

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Role	Name or position	What they do in the evaluation
Outside evaluator, if any		

How participant information will be kept private and who can see it:

How results will be used and reported

Who will review the data inside the organization, and how often:

What you will change if a measure falls short of its target:

Reports the funder requires, with due dates copied from the award or instructions:

How results will be shared with participants, partners and the community:

Evaluation plan check

- [ ] Every objective in the proposal has at least one indicator
- [ ] The plan has both process measures and outcome measures
- [ ] Every outcome measure has a baseline or a plan to collect one
- [ ] Every row names a tool, a role and a time
- [ ] The tools exist already or their development is in the timeline
- [ ] The cost of the evaluation appears in the budget
- [ ] The people who will collect the data have agreed that it is realistic
- [ ] The plan follows the funder's own evaluation requirements

> **Want help with this?** The Complete Grant Architect is a free 16-week grant writing course, and you can hire a grant writer for your next proposal. Both are at subthesis.com.

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