

Evaluation Process

Impact

1. How do you define success for your evaluation process?

Definition

2. Have your evaluations impacted policy or program governance? Do you track outcomes or actions on recommendations?

Yes

- Are you satisfied with this impact?

No

- What do you feel is hindering success?

3. Do you feel your evaluation process has been a success?

Yes

- What has contributed to its success?

No

What is holding back your success?

- Elements of the evaluation legislation?
- Weak connection to policymaking/policymakers?
- Resources?
- Organizational/administrative restrictions?
- Limited post-evaluation outreach?

What you review

1. Is your process rigid or flexible? Does it allow for adaptation?

Rigid

What aspects of your process are too restrictive? Do the scope and schedule make sense?

- Length of review cycle?
- Program review order?
- Number of programs subject to review?
- Frequency of report releases?
- Report content?
- Degree of analysis in each cycle (eg different tiers of review)?

Guided Exercise: Second Round Evaluation Reflection and Planning

Flexible	Does the flexibility give you professional freedom or is the process not defined enough?
Adaptation	<p>What changes would need:</p> <ul style="list-style-type: none"> • Legislative approval? • Permission from your oversight committee? • Your department/agency leadership?

Outreach

1. What is your current outreach strategy?	
2. Who is your target audience? Should you expand it?	<ul style="list-style-type: none"> • Legislators: • Specific Legislative Committees: • Executive Branch: • Administering Agencies: • Business Stakeholders: • Non-profit Stakeholders: • State Policy Groups: • Journalists: • Key informants from the evaluation process:
3. From where does your target audience get their information? Is there a more accessible format for your target audience?	<ul style="list-style-type: none"> • Evaluation briefs or summaries • Written reports delivered to legislative offices • Electronic versions emailed to policymaker chiefs of staff or policy advisors • Social media (X, Facebook, LinkedIn, YouTube, etc.) • Podcasts • News coverage • Presentations to Committees or administering agencies

Incentive Analysis

Planning Ahead

1. Has your team planned for staff turnover? What knowledge management tools does your team use to ensure access to past analyses?

2. Do you have the appropriate tools and expertise? How is your team's workload? How can you address gaps/issues?

- # of Staff
- Time
- Other assignments
- Expertise
- Software
- Data
- Consultants

3. Which evaluations are likely to be resource intensive? What resources or other tools do you need to plan for in advance?

- Large or new datasets
- External expertise
- New software
- Complex program
- Likely controversy

Reflecting on the Past

1. What elements of the program did you want to explore last time but did not? How can you make it happen this time?

2. What new information do legislators and other stakeholders want that wasn't included in earlier reviews?

3. What resonated with stakeholders from your last reviews? Should that be incorporated into other reviews?

Guided Exercise: Second Round Evaluation Reflection and Planning

4. Which recommendations were acted upon since the last evaluation?

5. What criticism did the report or analysis review receive last time? How do you plan to address or mitigate this?

Moving Forward

1. How much has changed since the program was last evaluated? How will that influence your evaluation approach?

State Policy Changes	
Federal Policy Changes	
Administrative Changes	
Changes to Program Goals or Metrics	
Data Collection Changes	
Changes to Economic Conditions	
Other	

2. What level of analysis makes sense? Can you tier your analysis based on degree of changes, program cost, type of tax expenditure?

3. How can you expand upon the previous evaluation?

4. Was new or different data collected since the last review that will facilitate new or more in-depth analysis?

5. Are there new stakeholders to include in the process? Could you expand your stakeholder engagement?
