

TOOL #2: THUMBNAIL EVALUATION PLAN

Guidance: The Thumbnail provides a snapshot of the entire evaluation process of a given project, and allows the project team to understand the extent of support required from the evaluation team. The document begins with grounding material (Ecotrust's Equitable Evaluation Principles), followed by naming the evaluand, the process, team, and implementation plan.

Evaluation Tools: Summary of Phases

1. Design

The M&E Team leads the design of the evaluation with participation from program staff using this Thumbnail. The M&E Team and program staff then jointly plan and convene participatory design sessions with partners and other impacted parties (see [Toolkit #3](#)).

2. Data Collection

With input from program staff, partners, and impacted parties, M&E Team designs data collection tools. This is an opportunity to transition from the M&E team leading evaluation design, to **program staff leading** the data collection process.

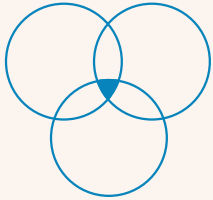
3. Data Analysis

The M&E Team takes the lead on reviewing the data and analyzing and coding for themes, growth areas, and assets.

4. Meaning-Making and Reporting

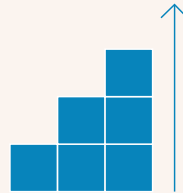
The M&E Team will share the findings with program staff to discuss themes, nuance, and possible next steps (improvements and successes). Together, program staff and M&E Team can generate next steps, recommendations for program revisions, and how the data will be shared externally and across stakeholders.

Equitable Evaluation Principles



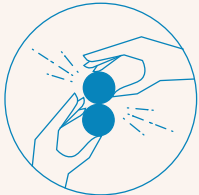
EQUITY AT THE CENTER

The practice of evaluation should be in service of and contribute to advancing equitable and just outcomes in the communities in which we partner. Our evaluations will be culturally responsive, developed collaboratively, and prioritize the needs and goals of participants.



ACKNOWLEDGE HISTORICAL AND CULTURAL CONTEXT

We understand that the practice of evaluation must be informed by historical and cultural context; it must seek to understand the effect of a strategy both on differently situated groups and the underlying systemic drivers of inequity.



RECOGNIZE POWER DYNAMICS

We recognize the power dynamics between evaluators and participants. We co-create our evaluations with our partners to empower program participants by reflecting their visions of success and desired outcomes.



BE AWARE OF INDIVIDUAL BIASES

Our team works to recognize our individual biases. As evaluators, we acknowledge how our background and other life experiences may impact the conduct of an evaluation. We work to understand how aspects of identity, including race, gender, class, indigeneity, ethnicity, culture, ability, language, and positional power, can influence an evaluation.

The Evaluand

Provide a brief overview of the project/program/initiative being evaluated.

Evaluation Purpose, Questions, and Intended Use

Explain why the project/program/initiative is being evaluated:

The evaluation questions guiding the inquiry are:

The evaluation questions are a priority for:

The evaluation learnings will be used by:

The evaluation learnings will be used for:

Team

An evaluation team will co-design and execute the evaluation. Summarize the team members (Ecotrust staff, partner organization members, community members, others), their roles, and their responsibilities in Table 1.

Table 1: The Evaluation Team

Member	Role	Responsibilities

Evaluation Methods

Our evaluation will use the following methods (e.g. surveys, structured/semi-structured interviews, check-ins, focus groups, etc.):

These methods have been selected because (for each method, provide a brief explanation):

Who will collect the data?

How much time and energy will the method require of them?

Who will contribute the data? How much time and energy will the method require of them?

When/how often will the data be collected?

Implementation Plan

The evaluation will begin on _____, and the first round of the evaluation cycle (design, data collection, and meaning-making) will be completed by _____.

Summarize the evaluation work plan in Table 2.

Table 2: Evaluation Work Plan

Task	Lead	Contributing	Product or Deliverable	Timeline
Example: Task 1: Eval design	Denise (co-lead)	Noah	2-3 page doc	Spring 2023
Example: Task 2: Eval questions	Denise (co-lead)	Noah	1-pager document	Spring 2023

Describe the Approach to Implementation

When/at what cadence will evaluation learnings be shared and with whom?

When and how will actionable recommendations be gleaned from the evaluation?

Who will be responsible for implementing actionable recommendations?

How/when/at what cadence will evaluation learnings for this program/project/initiative be reviewed, in relation to other evaluations undertaken by your organization?