

Checklist for Managing a General Program Evaluation Study¹

Status	Action	Step Reference(s) ¹
Initial Planning		
	Construct or confirm program logic model	Step 4
	Determine program decisions subject to evaluation	Step 1
	Develop statement(s) of evaluation objectives (evaluation's contributions to making a decision)	Step 1
	Determine type(s) of information needed to evaluate objectives	Step 1
	Determine appropriate type(s) of evaluation	Step 1
	Determine resources required to achieve objectives	Step 2
	Identify available resources (budget, staff, schedule constraints)	Step 2
	Reconcile resources and requirements	Step 2
	Determine date that final evaluation results will be needed to contribute to decisions	Step 3
	Develop procurement/award/implementation schedule to yield evaluation results by decision date	Step 4
Evaluation Design and Procurement		
	Develop evaluation question/researchable question table	Step 5
	Develop list of specific evaluation questions	Step 5
	Develop evaluation report outline	Step 7
	Develop Statement of Work (SOW), including: Objectives Evaluation plan requirements Research design requirements Deliverables Schedule/milestones	Step 1 Step 5 Step 6 Step 9 Step 9 Step 9
	If survey(s) requested, determine OMB clearance requirements Full clearance Customer satisfaction generic clearance	Step 6
	Follow other appropriate DOE contractor procurement procedures	
	Develop expert reviewer evaluation criteria (quality assurance)	Step 8
	Establish a quality assurance review process	Step 8
	Review proposals and select evaluation contractor	Step 9
Implementation of Study		
	Review evaluation plan including: Program manager review Outside expert review (if any)	Step 10

¹ This checklist has been developed from, and all references are to, the *EERE Guide for Managing General Program Evaluation Studies* (date)

Status	Action	Step Reference(s) ¹
	Approve evaluation plan	Step 10
	Authorize evaluation contractor to implement evaluation plan	Step 10
	Set progress review meeting schedule	Step 11
	Set progress reporting schedule	Step 11
	Set QA review/milestone schedule	Step 11
	Review draft report	
	Approve final report	
Using Evaluation Results		
	Develop distribution list for final report (Ensure that all stakeholders receive a copy of the evaluation findings that are of interest to them.)	Step 12
	Develop action plan to disseminate evaluation findings	Step 12
	Utilize evaluation results in program decisions	Step 13
	Establish/update program records for use in future evaluations	Step 14