Bureau of Justice Assistance (BJA)

Comprehensive Opioid, Stimulant, and Substance Use Program (COSSUP)

COSSUP Data and Evaluation Training and Technical Assistance Center

Evaluation Action Plan: Template and Tips

Introduction

This resource is designed to support partnerships between practitioners and evaluators who are implementing and evaluating programs, especially those designed to prevent, respond to, and address substance misuse. Program staff should develop and complete this action plan with their evaluation partner. The action plan is designed to lay out a plan for program evaluation. This includes clearly identifying the problem your project aims to address, the data that led to you identifying this problem, a logic model that identifies solution(s) to be tested, and a preliminary plan to evaluate program impact and implementation.

The evaluation action plan template is organized according to the following sections:

- Lead Agency and Project Name
- Problem Identification
- Evaluation Partner
- Logic Model
- Evaluation Action Plan Matrix
- Data Collection, Information Sharing, and Evaluation Training and Technical Assistance

Within each section, tips and resources are provided when possible. This resource should be used as a template. Respond to prompts and fill in sections, as appropriate.

Lead Agency and Project Name

Lead Agency Name

Project Name

Federal Award Number
(if applicable)

Problem Identification

Provide a brief description of the problem at hand, followed by a clear identification of the data or evidence that led to its discovery. Ensure that your description is concise yet comprehensive, highlighting key aspects of the issue and its underlying causes.

Evaluation Partner

Please name the evaluator with whom you are partnering for this project.

Evaluator Name

Organization

Contact Information

Logic Model

A logic model is a visual tool or representation that shows how a program works. It illustrates the relationships between the resources of a program, the activities being done, and the results (outputs and outcomes) that are planned on being achieved. It should be developed for a specific program or intervention as part of program planning and be completed through a collaborative process involving representatives from both the program and evaluation teams.

A **logic model template** is provided below. The Logic Model Template and Tip Sheet provides additional instructions, tips, and information to support logic model development. Brief descriptions of the information that should be included within each column are provided within the template.

A logic model can be developed for a single program that is being implemented in one or more geographic locations. Developing one or more logic models for multiple programs that share a common goal can be more challenging.

For technical assistance on developing a program logic model, please submit a request to the Comprehensive Opioid, Stimulant, and Substance Use Program (COSSUP) Resource Center at Training and Technical Assistance – COSSUP Resource Center.

Program goal: Enter a short, clear statement of what the program aims to achieve.

Inputs	Activities	Outputs	Outcomes		
			Short-term	Intermediate	Long-term
List the specific resources necessary to achieve the program goal. • Input 1 • Input 2 • Input 3 . . .	List the specific actions necessary to achieve the program's goal. • Activity 1 • Activity 2 • Activity 3 . . .	List the desired outputs to result from the activities; usually quantified as numbers. • Output 1 • Output 2 • Output 3 . . .	List the desired results to occur within 3 months of an activity. Short-term outcomes typically relate to learning. • Short-term 1 • Short-term 2 • Short-term 3 . . .	List the desired results to occur 3–6 months after an activity. Intermediate outcomes typically relate to actions. • Intermediate 1 • Intermediate 2 • Intermediate 3 . . .	List the desired results to occur 6 or more months after an activity. Long-term outcomes typically reflect the ultimate change or goal the program aims to achieve. • Long-term 1 • Long-term 2 • Long-term 3 . . .

External factors: List the external factors that may influence the program's success at achieving outcomes and goals (e.g., climate, economic structure, political landscape, changing policies and priorities). External factors may influence, and be influenced by, the program and can affect implementation, program recipients, staffing, and availability of other resources the program needs.

Evaluation Action Plan Matrix

An evaluation action plan matrix template is provided below and should be developed collaboratively by program staff, program partners, and the evaluator. It is intended to capture the approach that will be used to identify the data needed to measure program outputs and outcomes reflected in the logic model and set expectations regarding the evaluation scope and design, including when and from which agencies data will be collected. Creating an evaluation action plan matrix will support important conversations related to data availability, data quality, agreements that need to be in place to support data sharing, etc. An example of a completed evaluation action plan matrix is also provided below.

The evaluation action plan matrix includes the following key components:

- **Evaluation questions:** These are general questions that you hope to answer through the evaluation and that help guide the evaluation plan. We encourage you to consider process and outcome evaluation questions for each of your primary activities in your program.
  - Process evaluation measures project implementation and examines project activities to assess whether the project is being offered as intended and to identify areas for program improvement.
  - Outcome evaluation assesses the extent to which a program achieves its outcome-oriented objectives to measure program effectiveness.
  - Some sample evaluation questions (both process and outcome), indicators, data sources/tools, and timeline/person responsible are shown in a sample evaluation action plan matrix provided later in this tip sheet. These are only examples, and you do not need to use these specific questions. Your program staff; community stakeholders, including partners; and evaluation team may be helpful in developing and selecting key evaluation questions.
  - You may also use the following resource to help you in designing and planning your program evaluation: Guide to Program Evaluation – Getting Started. You can reference it or share with your team to support and enhance evaluation efforts.
- **Indicators:** These are the data types and measures that will help you answer the evaluation questions posed above.
- **Data sources and tools:** It is important to identify data sources that will help answer each research question. Will you be relying on data already collected, such as secondary data or those routinely collected by another agency or partner? Will you need to develop procedures, tools, or methods to collect new data to answer your research questions?
- **Timeline:** When will data be collected and analysis occur? Provide a general time frame.
- **Person responsible:** Who will be collecting data? Which member of the project staff or partner will be responsible for ensuring that data are collected according to the evaluation plan and providing the data to the evaluation team? Provide information that answers these questions to the best of your ability.

Evaluation Action Plan Matrix Template

In collaboration with your evaluator, fill out the following matrix to the best of your ability. You may also include a succinct narrative to accompany/expand upon the matrix that describes your evaluation approach.

Evaluation Question (What you want to know)	**Indicators** (What type of data you will need to answer the evaluation questions)	**Data Sources and Tools** (Where and how you will get the data)	**Timeline** (When you will collect and analyze the data)	**Person Responsible: Collection** (Who will collect the data)	**Person Responsible: Analysis** (Who will maintain, check for quality, and support the analysis of the collected data)

Narrative (optional):

Additional Resources for Developing an Evaluation Action Plan Matrix

- On the next page is an example of an evaluation action plan matrix tailored for an opioid response program targeting under resourced populations.
- Discover the Oswego County (New York) Evaluation Planning Matrix—This is a comprehensive resource offering valuable insights into capturing additional information crucial for effective planning. This matrix provides practical guidance with detailed examples for optimizing your strategies, ensuring comprehensive and impactful action plans.

Evaluation Question (What you want to know)	**Indicators** (What type of data you will need to answer the evaluation questions)	**Data Sources and Tools** (Where and how you will get the data)	**Timeline** (When you will collect and analyze the data)	**Person Responsible: Collection** (Who will collect the data)	**Person Responsible: Analysis** (Who will maintain, check for quality, and support the analysis of the collected data)
Sample process evaluation question: Were the ____ program activities completed as planned? [*This question may be broken down by major activity.*]	Increased number of completed activities/ subactivities	Work plans, meeting minutes, event records	Annually (August)	Program coordinator or team members	Program coordinator
Sample process evaluation question: What challenges occurred during implementation? What lessons were learned?	Types of challenges, types of lessons learned	Monthly progress reports, meeting minutes	Monthly	Program administrator, program coordinator, or evaluator	Evaluator
Sample outcome evaluation question: To what extent did the program improve access to naloxone for first responders? [*Consider including a similar question for each primary activity of the statement of work.*]	Increased number of first responders who are trained in the use of naloxone [*Consider referring to the Expected Results of Activities section of the statement of work for the indicators for outcome evaluation questions.*]	Monthly progress reports, spreadsheet tracking training attendees and distribution of reversal kits	Monthly	Program coordinator	Program coordinator
	Increased number of first responders who have access to naloxone overdose reversal kits				
Sample outcome evaluation question: To what extent did the program reach intended communities? [*Or specify which communities you intended to reach.*]	Completed plan to improve access to services	Demographic data, internal documents, reports, and meeting minutes	Annually (August)	Program administrator, program coordinator, or evaluator	Evaluator
	Increased number or percentage of participants from target groups	Participant registration forms, implemented activities from plan to increase access to services. [*Remember that you will need to collect demographic data in order to measure it!*]			

Data Collection, Information Sharing, and Evaluation Training and Technical Assistance

Training and technical assistance related to any of the topics below is available through the COSSUP Resource Center by submitting a request to Training and Technical Assistance – COSSUP Resource Center.

- Developing logic models for your program(s)
- Developing or enhancing data collection and tracking systems
- Finding and selecting an evaluator
- Completing an evaluation planning matrix
- Developing data sharing agreements
- Reviewing data collection instruments and informed consent procedures
- Connecting with peers and subject-matter experts

Visit the COSSUP Resource Center at **www.cossup.org**.

About COSSUP

COSSUP has transitioned from the Comprehensive Opioid, Stimulant, and Substance Abuse Program (COSSAP). This change in title for the program is indicative of efforts to reduce the stigma related to substance use and to support impacted people in their recovery journey.

About BJA

The Bureau of Justice Assistance (BJA) provides leadership and services in grant administration and criminal justice policy development to support local, state, and tribal law enforcement in achieving safer communities. To learn more about BJA, visit www.bja.gov and follow us on Facebook (www.facebook.com/DOJBJA) and X (formerly known as Twitter) (@DOJBJA). BJA is part of the U.S. Department of Justice's Office of Justice Programs.

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