#### **Preface**

### Who can benefit from this guide?

On a morning walk at your project site, you pause to notice the changes that have occurred around you. You and others have put a lot of time and effort into having a positive impact on this area. What effects have you had? Are you achieving the results you had hoped for? Would a different approach get you where you wanted to go more quickly or effectively? Anyone involved in ecosystem management or a community-based conservation project is faced with these questions. *Evaluation* is a powerful set of activities that can provide the answers and allow you to overcome some of the challenges of having a positive impact on the ground.

This guide provides a step-by-step process that allows projects of any size and at any phase to develop and implement evaluation. Whether you work for a small volunteer group or a government agency, whether you are doing community based conservation or ecosystem management, and whether the scale you are working on is a watershed or a forest preserve, using this guide can help improve the *effectiveness* of your project.

### What's inside this guide?

This guide is a tool to help you tailor evaluation to your project's unique needs and characteristics. By completing the enclosed worksheets and checklists, you will create *products* that help you:

- + Identify and clarify your project's goals and the multiple factors that influence your ability to achieve them
- Determine useful and feasible measures or indicators of progress toward your goals
- Gather the information you need to measure progress
- **→** Make use of the information you have gathered by linking it directly to decision-making

Evaluation activities, such as those described in this guide, have been shown to improve a project's clarity of purpose, overall effectiveness and levels of

financial and public support. Ultimately, evaluation can increase needed on-the-ground change.

A companion publication, the *Evaluation Sourcebook*, can support your use of this guide by providing tools and topic-specific evaluation information.

# The Evaluation Cycle

# Stage A: What are you trying to achieve?

Creating a Situation Map

**Step 1.** What are your goals and objectives?

Step 2. What threats and assets affect your project?

**Step 3.** What strategies are needed to achieve objectives?

**Step 4.** What are the relationships between your objectives, threats and assets, and strategies?

Step 5. What process issues and concerns affect your project?



Creating an Action Plan

Step 1. What are your trigger points?

**Step 2.** What actions will be taken in response to reaching a trigger point?

Step 3. Who will respond?

**Step 4.** How will you summarize and present your findings?

### Stage B: How will you know you are making progress?

Developing an Assessment Framework

Step 1. What do you want to know?

Step 2. What do you need to know?

**Step 3.** What will you measure to answer your evaluation questions?

**Step 4.** How might you use the information?

### Stage C: How will you get the information you need?

Preparing an Information Workplan

**Step 1.** Does available information suit your needs, and, if not, how will you collect it?

Step 2. What are your analysis needs?

**Step 3.** How will the necessary activities be accomplished?

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