

BI Evaluation Plan Information Sheet:

A BI evaluation plan should be an integral part of a grant proposal that provides information to improve BI programs/portfolios/projects and their respective activities during development and implementation.

1. Have you considered the two types of evaluation plans? Yes or No

The components of your BI evaluation plan may depend on the type you use-

Formative: A formative evaluation does the following:

- Assesses initial and ongoing project activities
- Begins during project development and continues through implementation
- Provides new and sometimes unanticipated insights into improving the outcomes of the project
- Involves review by the principal investigator, the steering or governance committee, and either an internal or external evaluator (depending on grant requirements)

Summative: A summative evaluation does the following:

- Assesses the quality and success of a project in reaching stated goals
- Presents the information collected for project activities and outcomes
- Takes place after the completion of the project
- Involves review by the principal investigator, the steering or governance committee, either an internal or external evaluator, and the program director of the funding agency

2. Have you identified all participants/stakeholders (those directly involved in the project) and (those otherwise invested by credibility, control, or other capital), Yes or No

3. Have you completed each part of the BI evaluation plan process below? This includes steps from preparation to implementation and interpretation. Yes or No

- **Process 1:** Have you developed a conceptual model of the BI project and identify key evaluation points? This ensures that all participants and stakeholders understand the BI project's structure and expected outcomes, and helps focus on the BI project's most important elements.
- **Process 2:** Have you created BI evaluation questions and define measurable outcomes? Outcomes may be divided into short-term, mid-term, and long-term, or defined by the more immediate number of people affected by the BI project versus the overall changes that might not occur until after the project's completion.

- **Process 3:** Have you developed an appropriate BI evaluation design? A successful BI evaluation both highlights the most useful information about the project's objectives and addresses its shortcomings. In developing a BI evaluation design, determine who will be studied and when, and then select a methodological approach and data collection instruments.
- **Process 4:** Have you collected and when will you collect BI data? BI happens in a finite amount of time so providing an appropriate timeframe is very relevant.
- **Process 5:** Have you analyzed the BI data and presented to interested audiences? Who are your interested audience/s?

Note: Please contact BIR and/or CRPDE for clarification if needed.