CENTER FOR EVALUATION & RESEARCH FOR STEM EQUITY

UNIVERSITY *of* WASHINGTON

Evaluation Expectation Setting Tool

Liz Litzler[1]   Emily Affolter[2]   Cara Margherio[1]   Emily Knaphus-Soran[1]   Erin Carll[1]

Project Planning: Scope of Work, Budgeting, & Reporting
(Preparing for a conversation with a potential evaluator)

Questions to consider	My Expectations/Goals
How and when should I engage a potential evaluator in proposal development?	
What can I afford to budget for an evaluator? What will that budget enable?	
What types of data collection do I want to see happen? Who will be responsible for each piece of data collection? What are my expectations for accessing the raw data (vs. aggregated data)?	
What reporting formats would most support me in my reporting to funders and in decision-making?	
How important is it to me to have results disaggregated by identity groups?	
Do I want my evaluator to help with my dissemination (e.g., through journal and conference paper collaboration)? Can my evaluator publish using my evaluation results? Can they share them on their website?	

Communication Expectations

Questions to consider	My Expectations/Goals
How and how often will I communicate with my evaluator? Who will be the evaluator's point person? How quickly do I expect a response to emails I send?	
How can my evaluator and I communicate about our work with transparency?	
How can I model inclusivity in my project and in how I work with my evaluator? What can I do to decrease power differentials with the evaluator and work as a partnership?	
How much background and context of the project and organization will I share with my evaluator?	

[1]University of Washington Center for Evaluation & Research for STEM Equity
[2]Prescott College

Questions to consider	My Expectations/Goals
How and how often do I want my evaluator to provide formative feedback?	
How and how often do I want my evaluator to provide summative feedback?	
How and how often (if at all) do I want my evaluator to provide feedback on my program processes?	
How and how often do I want my evaluator to provide equity-specific feedback? Are there specific ways my evaluator can help hold me accountable to my equity values and goals? Am I aware of any equity-related areas for growth that I have that I want my evaluator to advise me on?	
What will be my process for self-reflection after receiving project/equity-related feedback?	
How will I deal with conflict with my evaluator?	
How will I deal with/communicate with my evaluator about changes to the scope of work?	

Additional questions to consider:

- How will/how does my project/grant align with my equity values?
- How do all of my answers fit (or not) with my equity values, including with respect to how I intend to manage my relationship with my evaluator?