Draft Goal-Setting Guide for Cathexis Evaluations[1]

Client name: _____   Date: _____

Project name: _____

When we finish a project, we like to check to see if we have met our clients' goals for the project. It helps if we clearly define those goals at the beginning of the project. Could we take a few minutes now to explore your goals for this project?

1. Why are you doing this evaluation?
Probe to uncover the ultimate goal(s). Possible probes include:
- *Why are you spending the time and resources to do this?*
- *What are you hoping/planning to do with the information that comes out of this evaluation?*
- *What do you ultimately hope to achieve?*

Cathexis to use the following table to identify the client's top 1-3 goals for the project, then share these with the client for verification:

Evaluation Goals	✓
a) Help you better understand your clients' needs	
b) Help you communicate more effectively about an initiative	
c) Help you improve an initiative (e.g., its design, implementation, cost-effectiveness)	
d) Help you decide how to allocate limited resources	
e) Help you decide if an initiative should be continued	
f) Help you be more accountable to your funders or stakeholders	
g) Generate knowledge (e.g., about an issue or intervention)	
h) Improve communication within your organization	
i) Help you promote or defend specific methods, approaches, or programs	
j) Increase your understanding of research and/or evaluation	
k) Other (specify): _____	

2. For each goal identified: How might we know if the evaluation helped?
   Probes:
   - **What would change?**
   - **How would you know if it changed? (keep it specific and measurable)**
   - **When would it change?**

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[1] If you modify this tool and wish to give credit to Cathexis, then we would prefer that you use the following wording: "This is a modified tool based on the October, 2008 *Draft Goal Setting Worksheet for Cathexis Evaluations* by Cathexis Consulting Inc."