Draft Meta-Evaluation Process[1]

WHEN STARTING THE PROJECT:

☐ Project manager reviews the RFP or similar documents (if available) to identify the desired goals of the evaluation.

☐ Project manager guides the client through the goal setting worksheet.

☐ Project manager creates a project summary that includes the goals, as well as other pertinent information about the project. This summary becomes part of the project workbook.

Optional, if client is interested:

☐ Project manager and/or client may develop / identify tools for measuring goal attainment, if possible and appropriate.

☐ Project manager and/or client may conduct baseline assessments, if appropriate, for any of the goals.

DURING THE PROJECT:

These steps should be carried out halfway through a project, or as needed. For projects lasting more than 6 months, it would be ideal to do this every 3 months or so.

☐ Project manager touches base with client to see how satisfied they have been to date, and whether anything could be improved. Use the interim client interview guide.

☐ At the same time, the project manager reflects on and records what is going well, and what could be improved. Use the interim project manager reflection guide.

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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 May, 2008 *Draft Meta-Evaluation Process* by Cathexis Consulting Inc."

WITHIN ONE MONTH OF PROJECT COMPLETION:

☐ The project manager and client discuss the available evidence about achievement of goals. Sources of evidence will depend on the measurement tools selected (if any), but could include information from the interim client interviews. The project manager summarizes this evidence and gives a copy to the client for their reference.

☐ Someone familiar with the project (but not the project manager) interviews the client. The final client interview guide will need to be customized, based on the goal setting worksheet and interim client interviews.

☐ The results of the client interview are shared with the project manager.

☐ Project manager holds a project review session with the team. The team identifies what worked and opportunities for improvement, based on their own thoughts and feedback from the interview. Use the review session agenda.

☐ Project manager updates the project database.

☐ Project manager completes the project summary to include information about client satisfaction and goal achievement.

APPROXIMATELY ONE YEAR AFTER PROJECT COMPLETION:

☐ Someone familiar with the project (but not the project manager) interviews the client about longer-term outcomes. The follow-up client interview guide will need to be customized, based on the final client interview.

☐ Project manager updates the project database, if applicable.

☐ Project manager updates the project summary, if applicable.