



## Information we need to gather when scoping an evaluation: Evaluation Scoping ‘Cheat Sheet’

‘Scoping an evaluation’ involves getting the information you need to be able to develop a comprehensive, robust, high quality plan for an evaluation; in particular, scoping will inform the context/trigger/question for the evaluation (see the Evaluation Commissioning form).

The questions in this ‘cheat sheet’ reflect the broad questions we are seeking to answer when gathering information during scoping.<sup>1</sup> They are prompts for what you need to consider and clarify to be able to plan a useful, high quality evaluation.

The questions are a general guide to aid your scoping process. It is not intended that you work through all of them in a strict linear sequence; you might decide some questions are irrelevant and/or cycle through questions repeatedly when planning the evaluation.

### *Defining questions*

- What is being evaluated? (Background documents)
- What is it expected to achieve? How is it expected to achieve this? (Are there clearly defined outcomes? Is there a clear intervention logic? Will an intervention logic need to be developed?)
- What does success look like? What factors will influence its success? (Are there any criteria for judging how well it is working? How fit-for-purpose is its design?)
- What stage is it at in design or implementation? How will this affect the timing of evaluation activities?

### *Framing questions*

- Who in the Ministry is involved in implementation? What project governance arrangements are in place?
- Why is it important to evaluate this? How significant is this? How will this contribute to MOE’s evidence base?
- Who will use the evaluation findings?
- How will they use the findings, what will they use the evaluation findings for – what decisions do they want to make?
  - Should the evaluation make recommendations/suggestions for consideration?
- What are the key evaluation questions – what information do the decision makers need?

### *Managing questions*

- Who is commissioning the evaluation? Who will be funding it?
- Who will make decisions about the evaluation? (Project governance)

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<sup>1</sup> These questions are based on information in the BetterEvaluation website <http://www.betterevaluation.org>.

- Who are the evaluation stakeholders?
  - Who should be consulted?
  - What stakeholder management arrangements might we need (eg, communications strategy, reference group)?
- What resources are available to do the evaluation? (Budget, staff)
- What data sources already exist – has any previous research and evaluation been conducted? Has collecting monitoring information been designed into its implementation?
- What evaluation deliverables are required, by when? Have any commitments about evaluation been made already?
- What expectations are there about report publication and audiences?
- What are the ethical and cultural considerations?
- What risks do we need to mitigate?