**Evaluation Planning and Reflecting Template**

**Getting started with the Impact by Design Steps**

This template aligns with the [**Evaluation for Impact Cycle**](https://sites.reading.ac.uk/evaluation-and-impact/) and the [**Impact by Design Steps**](https://sites.reading.ac.uk/evaluation-and-impact/impact-steps/) of the Evaluation and Impact Framework.This template is separated into two distinct sections. Complete the **Evaluation Planning** section before your evaluation and the **Evaluation Reflection** section after your evaluation.

**Evaluation Planning - *Plan, Design and Do***

The purpose of this section is to help you plan an effective evaluation of your activity/initiative. It maps to the *plan, design and do* stage of the Impact by Design Steps.

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| **Evaluation Planning** |
| **Activity/Initiative name** |  |
| **Contact/s** (Name/School/Department/Function/Email)  |  |
| Here is an opportunity to provide a clear rationale for the activity/initiative/project and outline your planned evaluation. |
| **Step 1: Why are you doing this? What are you trying to achieve?** *What are you hoping will change as a result? Break down by staff, students, other stakeholders.***A. Driver/Rationale** [What is the need, problem or opportunity? What evidence is there for this need, problem or opportunity?]**B. Overview of the activity/initiative/project**[Describe the initiative and what you plan to do?]**C. Objectives**[Describe your key objectives. What exactly are you hoping to achieve?]**D. Linking to institutional and departmental strategic priorities**[Identify which areas you plan to positively impact on.][x]  Tick all that apply.The [KPIs and areas of priority diagram](https://sites.reading.ac.uk/wp-content/uploads/sites/42/2019/11/KPIs-Linking-to-success-of-UoR-Handout.pdf) will help with this*.* **Areas of Enhancement** |
| **Student Experience and Student Partnership**[ ]  Sense of belonging & connectedness[ ]  Information, Advice & Guidance[ ]  Resilience & independence[ ]  Transition, knowledge & skills[ ]  Personal and professional development | **Access and Participation****For students from under-represented backgrounds:**[ ] Recruitment[ ]  Raising schools and colleges attainment levels[ ]  Enhancing retention and degree outcomes[ ]  Enhancing employment /further study rates | **Curriculum Framework****Graduate Attributes:**[ ] Mastery of the discipline[ ] Skills in research & enquiry[ ] Personal effectiveness & self awareness[ ] Global engagement & multicultural awareness**Academic Principles:**[ ] Discipline based[ ] Research based[ ] Diverse & inclusive[ ] Global[ ] Contextual |
| **UKES**[ ]  Critical thinking[ ]  Learning with others[ ]  Interacting with staff[ ]  Reflecting & connecting [ ]  Course challenge[ ]  Engaging with research staff[ ]  Student partnerships[ ]  Skills development[ ]  How students spend time | **NSS/PTES**[ ]  Teaching on my course[ ]  Learning opportunities[ ]  Academic support[ ]  Assessment & feedback[ ]  Learning Resources[ ]  Learning community[ ]  Student voice | **TEF Criteria**[ ]  Student engagement with learning[ ]  Valuing teaching[ ]  Rigour & stretch [ ]  Assessment & feedback[ ]  Student partnership[ ]  Resources[ ]  Scholarship, research & professional practice[ ]  Personalised learning[ ]  Employability & transferable skills[ ]  Employment & further study[ ]  Positive outcomes for all |
| **University goals and key performance indicators (KPIs)**[ ]  Teaching and learning satisfaction [ ]  Retention [ ]  Attainment [ ]  Employment [ ]  Outcomes for all |
| **Step 2:** **What are you going to do to achieve the intended result?** *Who will be involved?***A. Participants**[Which colleagues or students will be involved/affected by the project?]**B. End User**[Who will use the end product of your project?]**C. Some initiatives are designed to support specific groups of students. Does your activity/initiative/project support any of the following groups?** [x] Tick all that apply. |
| [ ]  Students from disadvantaged backgrounds (POLAR, IMD, Household income)[ ]  First Generation HE attenders[ ]  UG Part 1[ ]  UG Part 2[ ]  UG Part 3/4 | [ ]  Disabled students[ ]  Male students[ ]  Female students [ ]  Black & minority ethic students [ ]  White students[ ]  PGT[ ]  PGR | [ ]  Mature students [ ]  LGBTQ+ [ ]  Commuter students [ ]  Care leavers or estranged students [ ]  EU[ ]  Non-EU[ ]  Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | [ ]  The initiative is not designed with a specific demographic group of students in mind |
| **D. Funding**[If applicable**,** give details of funding for this activity/initiative/project. Outline the source of funding, the amount of funding, and how funding will be allocated.] |
| **Step 3. What will success look like?***What impact would you expect to see in the short, medium and long-term?***A. Outputs**[What will be created as a result of the activity/initiative/project?]**B. Outcomes**[What will change because of the activity/initiative/project?] [If possible, break it down by the five different levels of the Evaluation and Impact Framework.]More information on our five levels of impact can be [found here](https://sites.reading.ac.uk/evaluation-and-impact/resources/) |
| **Level 1** **Reach** | [Measures numbers, coverage and usability of activities and involvement of participants and/or targeted groups.] |
| **Level 2** **Reaction** | [Analyses feedback on participants’ reaction? Was it useful, engaging, interesting, enjoyable?] |
| **Level 3** **Learning** | [Measures whether information has been absorbed and objectives have been met.] |
| **Level 4** **Behaviour** | [Analyses the extent to which newly acquired skills, knowledge, or attitudes are applied in different contexts.] |
| **Level 5** **Results** | [Determines if there has been any positive impact on the strategic objectives (e.g. KPIs) of the University e.g. access, participation, retention, attainment, progression.][Results could also cover impact on more localised objectives at School or Departmental level.] |
| **Step 4. Which methods of evaluation will you use to measure success?** *What datasets might you need to access?***A. Purpose and scope**[You could comment on the purpose and scope of the evaluation]**B. Methods**[How will the evaluation will be conducted, what data collection methods and analysis procedures do you plan to use?] Help formulating evaluation questions [can be found here](https://sites.reading.ac.uk/wp-content/uploads/sites/42/2019/10/Five-levels-of-Impact-Sample-questions.pptx).  |

***Reflection is an essential part of the evaluative process. Once you finish your evaluation, we encourage you to complete the remainder of this template.***

**Post-Evaluation Reflection- *Reflect, Refine and Enhance***

The purpose of this section is to help you to structure your reflection on your evaluation and should be completed **after** your evaluation. It maps to the *reflect, refine, enhance* stage of the Impact by Design Steps.

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| **Evaluation Reflection**  |
| **Activity/Initiative name** |  |
| **Contact/s** (Name/School/Department/Function/Email)  |  |
| Here is an opportunity to reflect and consider how you can refine and enhance your approach and methodology.  |
| **Step 5. Did the methods allow you to gather the data you needed?** *What worked well? What was missing? Which methods might you use next time?*[You could also:Consider the effectiveness of the evaluation approaches used (Consider strengths, weaknesses and limitations).Comment on the quality of information collected or collated.] |
| **Step 6. What did you learn from your evaluation results?***Did the results demonstrate the activity achieved its pre-set objectives?*[In the following sections you could include evidence of actual results of the activity/initiative/project and link these back to your objectives. Were there any unexpected results? Consider how the activity/initiative/project impacted on different groups.]**A.** Impacts**B.** Outcomes**C.** How do your evaluation findings map against relevant levels of impact? |
| **Level 1** **Reach** | [Measures numbers, coverage and usability of activities and involvement of participants and/or targeted groups.] |
| **Level 2** **Reaction** | [Analyses feedback on participants’ reaction. Was it useful, engaging, interesting, enjoyable?] |
| **Level 3** **Learning** | [Measures whether information has been absorbed and objectives have been met.] |
| **Level 4** **Behaviour** | [Analyses the extent to which newly acquired skills, knowledge, or attitudes are applied in different contexts.] |
| **Level 5****Results** | [Determines if there has been any positive impact on the strategic objectives (e.g. KPIs) of the University e.g. access, participation, retention, attainment, progression.][Results could also cover impact on more localised objectives at School or Departmental level.] |
| **Step 7: Is there anything you need to change to better achieve your objectives?***What aspects can and can’t you change and why? What can you change quickly? What will take longer and why?* [Other areas you could include:What can you conclude, and do you have any recommendations?Have any changes or enhancements been implemented or are any planned?What key lessons have been learnt and how could they be applied to this and other similar initiatives in future?Was funding allocated appropriately? Could it have been used more effectively? (If applicable)If running the activity/initiative/project again, what would you do differently next time?] |
| **Step 8: How will you report, disseminate and feedback the findings of your evaluation?***How will you close the feedback loop? Consider communicating changes you will and will not make and why. Feed forward changes to future cohorts.*[How will you disseminate the findings of your evaluation to students/colleagues/other interested stakeholders?] |
| ***NOTE: You may be required to complete a more formal report on your activity/initiative/project.*** *The Evaluation and Impact Framework Evaluation Reporting template* [*can be found here*](https://sites.reading.ac.uk/wp-content/uploads/sites/42/2019/11/Reporting-Template-FINAL.docx)*.* |