

## CASE STUDY EXERCISE: MONITORING OR EVALUATION PLAN

Group Project: Planning Needs Assessment, Monitoring and Evaluation for the Case Study

*(Guidance for the Monitoring Plan or Evaluation Plan for the Case Study)*

### MATERIALS:

Group Project Overview

Case Study Description

Case Study Summary Worksheet

Worksheet: Monitoring Plan

Worksheet: Evaluation Plan

Worksheet: Scheduling and Constraints

### INSTRUCTIONS:

For this activity, you will develop a Monitoring Plan or an Evaluation Plan for the Case Study (your group can choose whether they would prefer to do a Monitoring Plan or an Evaluation Plan).

Imagine that your group has been asked to oversee the implementation a Monitoring Plan or an Evaluation Plan for the program described in the Case Study.

- If your group would like to do a Monitoring Plan, please complete the Worksheet: Monitoring Plan.
- If your group would like to do an Evaluation Plan, please complete the Worksheet: Evaluation Plan.

Note, below are examples of evaluation questions.

- Of the courses offered in 2008, which were judged to be the most useful by participants?
- Which training courses in the program are the least effective in improving performance?
- What was the "pre course" knowledge of course participants versus the "post course" knowledge in the 8 knowledge areas of the course?
- What do bureau managers consider to be the most important employee performance issues to be addressed by the Human Resources Department in planning their 2010 program?

**WORKSHEET: MONITORING PLAN FOR THE CASE STUDY**

Refer to the Case Study materials to develop a Monitoring plan using the tables below.

| Project<br><i>Outcome</i><br>Indicators | Baseline<br>Value<br>(Year) | Target<br>Values<br>Year 1 | Target<br>Values<br>Year 2 | Target<br>Values<br>Year 3 | Data Collection:<br>Frequency and<br>Reports | Data Collection:<br>Instruments | Responsibility<br>for Data<br>Collection |
|---|-----------------------------|----------------------------|----------------------------|----------------------------|--|---------------------------------|--|
|   |                             |                            |                            |                            |  |                                 |  |
|   |                             |                            |                            |                            |  |                                 |  |
|   |                             |                            |                            |                            |  |                                 |  |

| Project<br><i>Output</i><br>Indicators | Baseline<br>Value<br>(Year) | Target<br>Values<br>Year 1 | Target<br>Values<br>Year 2 | Target<br>Values<br>Year 3 | Data Collection:<br>Frequency and<br>Reports | Data Collection:<br>Instruments | Responsibility<br>for Data<br>Collection |
|--|-----------------------------|----------------------------|----------------------------|----------------------------|--|---------------------------------|--|
|  |                             |                            |                            |                            |  |                                 |  |
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|  |                             |                            |                            |                            |  |                                 |  |

**WORKSHEET: EVALUATION PLAN FOR THE CASE STUDY**

Refer to the Case Study materials to develop an Evaluation Plan using the table below.

| <b>Evaluation Questions</b> | <b>Specific Sub-Questions</b> | <b>Indicators</b> | <b>Measures</b> | <b>Data Sources</b> | <b>Data Collection Technique</b> | <b>Data Analysis</b> |
|-----------------------------|-------------------------------|-------------------|-----------------|---------------------|----------------------------------|----------------------|
|                             |                               |                   |                 |                     |                                  |                      |
|                             |                               |                   |                 |                     |                                  |                      |
|                             |                               |                   |                 |                     |                                  |                      |
|                             |                               |                   |                 |                     |                                  |                      |

## WORKSHEET: SCHEDULING AND CONSTRAINTS

To finish up the needs assessment plan for the Case Study, you have two tasks: (1) Develop a schedule for your Monitoring or Evaluation plan, and (2) Identify constraints or challenges that you expect to encounter.

### *SCHEDULE:*

Use this section of the worksheet to create a simple schedule for the data collection and interpretation for the needs assessment.

| Date(s) | Task | Person(s) Responsible | Deliverables/Outputs |
|---------|------|-----------------------|----------------------|
|         |      |                       |                      |
|         |      |                       |                      |
|         |      |                       |                      |
|         |      |                       |                      |
|         |      |                       |                      |
|         |      |                       |                      |
|         |      |                       |                      |

### *CONSTRAINTS:*

What are the top three constraints (or challenges) you expect you may face with implementing your Monitoring or Evaluation plan for the Case Study?

Constraint 1:

Constraint 2:

Constraint 3: