

Evaluation starter kit

A practical starting point for organizations evaluating their own work without a dedicated evaluator on staff. Adapt every template below to your program before use.

1. Theory of change

Map the logic before you measure anything: the problem you're responding to, what you do, what that produces, and what you expect to change because of it. Write one sentence per box.

Problem / need	Activities	Outputs	Outcomes	Key assumptions
Worked example: Young adults leaving care lack job-search support.	Weekly coaching sessions, mock interviews.	# sessions held, # participants coached.	Participants apply to more jobs; feel more confident interviewing.	Coaching is the main barrier, not employer demand.
[Your problem or need]	[Your activities]	[Your outputs]	[Your outcomes]	[Your assumptions]

2. Indicator library starter

Pick two or three indicators per domain rather than tracking everything. These are starting points, not requirements.

Domain	Sample indicator	Data source	Frequency
Reach	Number of unique participants served	Intake log	Monthly
Engagement / dosage	Average sessions attended per participant	Attendance sheet	Monthly
Satisfaction	% who would recommend the program	Exit survey	Per cohort
Knowledge / skill change	Pre/post score on core skill check	Pre/post assessment	Per cohort
Behavior change	% reporting the new behavior at follow-up	Follow-up call/survey	90 days post
Referral & partnership	Number of active referral partners	Partner log	Quarterly
Service quality	% of sessions delivered as planned	Facilitator checklist	Monthly
Cost-efficiency	Cost per participant served	Budget records	Annually

3. Consent essentials

Before anyone takes part, make sure your consent process covers:

- Why you're collecting information, in plain terms
- That taking part is voluntary and refusing has no penalty
- Exactly what's collected and how it will be used and stored
- The right to withdraw at any point, and how to do it
- Who to contact with questions or concerns
- A plain-language read-back before any signature or verbal agreement

For accommodations and formats, pair this with the companion *Accessible Research Practice* checklist.

4. Interview guide template

Fill in the brackets for your topic. Keep core questions open-ended; use probes only if the answer doesn't cover them.

1. **Opening** — restate purpose, confirm consent, confirm time available ([30–45 min]).
2. **Warm-up** — [Tell me a bit about your experience with...]
3. **Core question 1** — [topic]. Probes: What made that easier / harder?
4. **Core question 2** — [topic]. Probes: Can you give an example?
5. **Core question 3** — [topic]. Probes: How did that compare to what you expected?
6. **Closing** — Is there anything we should have asked but didn't? Explain what happens next.

5. Reporting outline

Section	What goes here
Executive summary	The headline finding and recommendation, in half a page.
Purpose & context	Why this evaluation, for whom, and what decisions it informs.
What we did	Methods, sample, timeframe, and any deviations from plan.
What we found	Findings organized by theme or research question, not by data source.
What it means	Interpretation, alternative explanations, and limitations.
What we recommend	Specific, actionable next steps tied to findings.
Appendices	Instruments, consent forms, and full data tables.

Want help putting this into practice?

Connect with CometX to talk through your evaluation, research, or reporting needs.

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