

DEVELOPING AN EVALUATION PLAN

A PRACTICAL GUIDE

A five-year approach to learning, improvement, and impact

- 1 Define results and monitor progress
- 2 Decide what the Council will evaluate
- 3 Gather information in accessible ways
- 4 Review findings and use them
- 5 Bring the plan together



A practical guide to help Councils plan, carry out, and use evaluation over a five-year period.

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INTRODUCTION

Purpose

A five-year evaluation plan can help a Developmental Disabilities Council stay focused on what matters most, show progress over time, learn from experience, and make thoughtful decisions along the way.

This guide is written for Council staff, Council members, and contracted partners who contribute to planning, reviewing progress, and strengthening Council work. It is organized around the core parts of a strong five-year evaluation plan and reflects sound evaluation practice that support plans that are practical, credible, accessible, and useful.

This guide focuses on strategic planning for evaluation across the full five-year period. It invites Councils to set an overall approach, identify priority questions, describe how progress will be reviewed, and refine the plan as learning develops over time.

Monitoring and Evaluation in Plain Language

Monitoring and evaluation work together and each brings something valuable. A strong five-year evaluation plan brings both together.

Monitoring keeps attention on progress. It helps the Council look at questions such as:

- Are activities moving forward?
- Are the intended people and partners being reached?
- What signs of progress are visible over time?

Evaluation adds deeper learning. It helps a Council explore questions such as:

- What seems to be working well?
- What is proving harder than expected?
- What helps explain the results we are seeing?
- What changes may strengthen future work?



How to Use This Guide

This guide is organized around five connected parts:

1. Define results and monitor progress.
2. Decide what the Council will evaluate beyond required measures.
3. Gather information in accessible and useful ways.
4. Review findings, decide what they mean, and use them.
5. Bringing the plan together.

The first four parts guide Councils through the main steps of evaluation planning. The final part helps Councils look across the full plan to confirm that outcomes, evaluation questions, information-gathering methods, review processes, tools, and use of findings fit together in a practical way.

Each part includes two kinds of content.

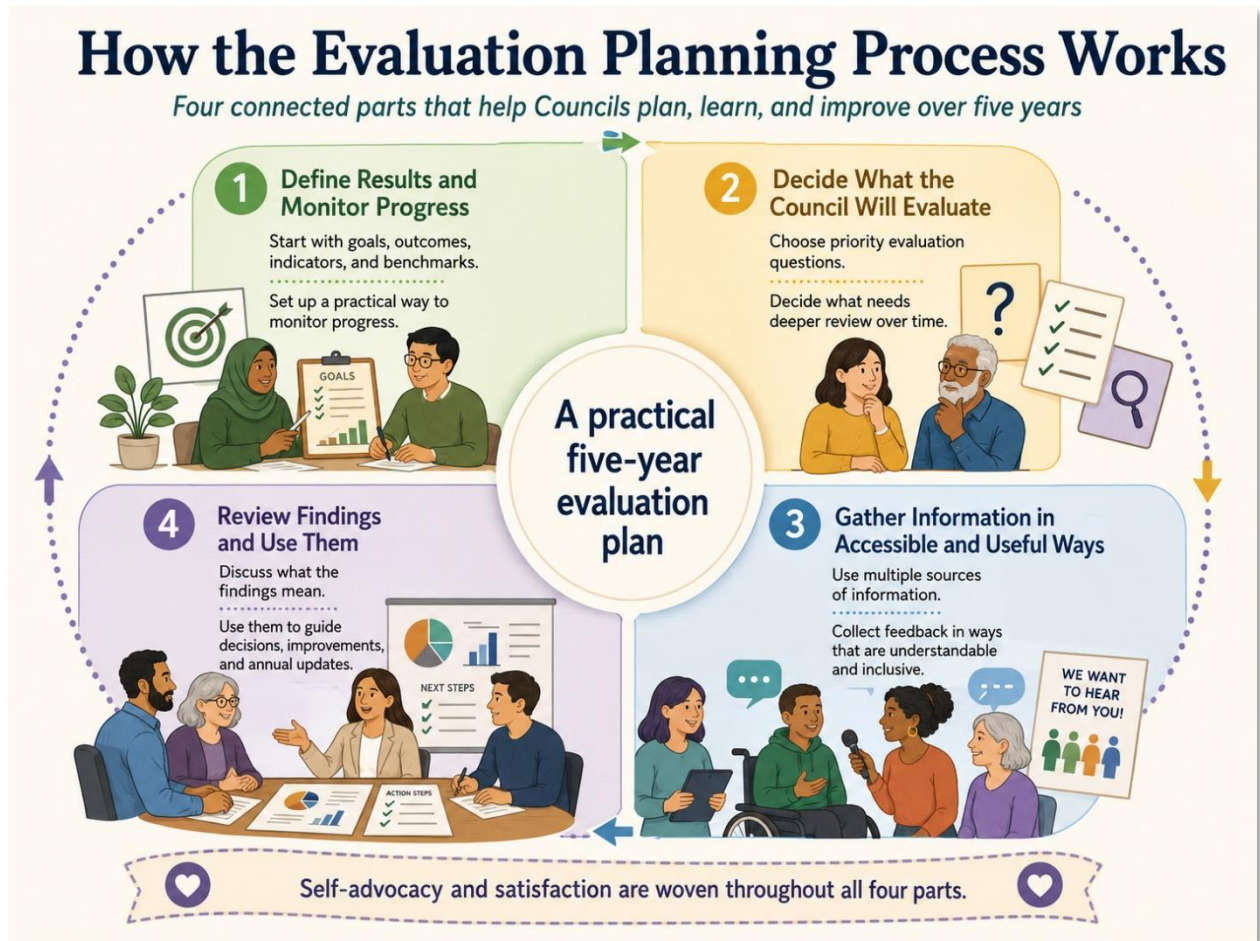
- ▶ **Learn** sections explain the key ideas behind each step. These sections introduce important evaluation planning concepts, such as outcomes, indicators, evaluation questions, data sources, accessibility, review processes, and use of findings.
- ▶ **Apply** sections help Councils put those ideas into practice. These sections point readers to related tools, worksheets, templates, or checklists and include guiding questions to help Councils make decisions about their own five-year evaluation plan.

The tools in the Resources section are designed to support this process. Councils can use the tools that are most helpful for the step they are working on, adapt them to fit their needs, and return to them as the plan develops.

Self-advocacy and satisfaction are woven throughout the Guide, so they remain visible in outcomes, evaluation questions, feedback processes, review discussions, and decisions about improvement.

Councils can use this guide from beginning to end when developing a new evaluation plan. They can also use individual sections and tools to strengthen parts of an existing plan. The goal is to support an evaluation plan that is clear, useful, realistic, accessible, and manageable across the full five-year period.

Figure 1. Four Steps to Developing a Five-Year Evaluation Plan.



STEP 1. DEFINE RESULTS AND MONITOR PROGRESS

Learn: How to Define Results and Track Progress

A five-year evaluation plan can paint a clear picture of what the Council aims to achieve and how progress will be followed over time. This step brings attention to the changes the Council hopes to see over time, not only the activities it carries out.

Start with Goals, Objectives, and Expected Results

For each objective in the 5-Year State Plan, the Council can describe the results it hopes to achieve. These results can focus on change as well as activity.

A useful way to organize results is to think about three levels of change:

- ▶ **Short-term outcomes:** Early changes in awareness, knowledge, skills, engagement, or participation.
- ▶ **Intermediate outcomes:** Changes in behavior, practice, representation, policy engagement, partnerships, or systems.
- ▶ **Long-term outcomes:** Lasting improvements in systems, inclusion, access, self-determination, leadership, or quality of life.

Councils do not need to force every objective into all three levels if that does not fit the work. However, this structure can help clarify what progress may look like over time.

Distinguish Activities, Outputs, and Outcomes

Clear evaluation planning keeps activities, outputs, and outcomes distinct:

- ▶ **Activities** are what the Council supports or carries out, such as training, policy work, partnership meetings, grants, advocacy support, or public education.
- ▶ **Outputs** are the direct products of those activities, such as number of trainings held, number of participants, materials developed, or meetings conducted.
- ▶ **Outcomes** are the changes that result, such as improved leadership skills, stronger advocacy participation, policy changes, increased inclusion, or better access to services and supports.

A strong evaluation plan includes outputs and shows how the Council will recognize meaningful change.

Identify Key Results and Indicators

For each objective, the Council can identify the key results it wants to achieve. Key results can be linked to intended outcomes and expressed in measurable or observable terms. Indicators may be quantitative or qualitative.

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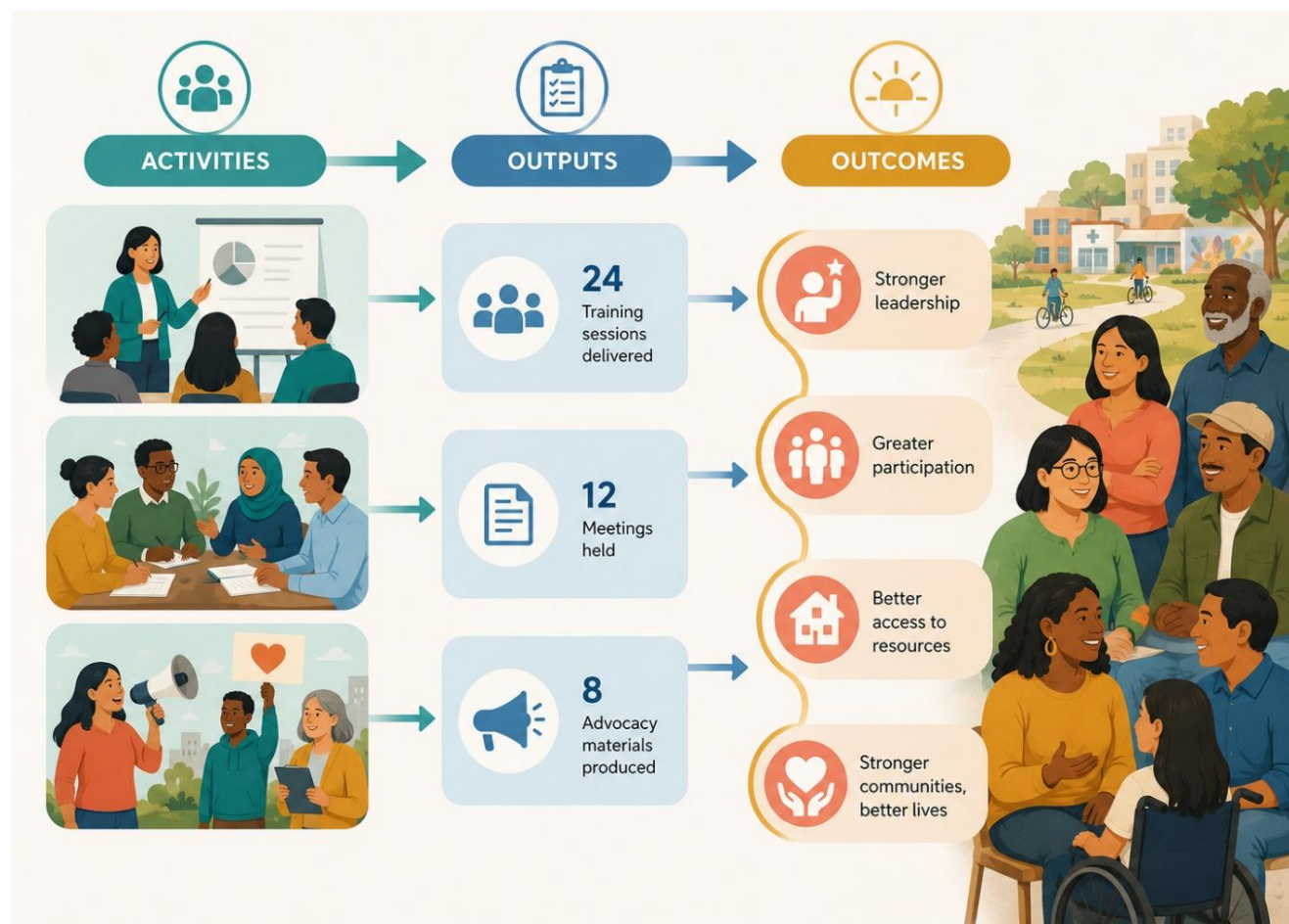
Examples of **quantitative indicators** include:

- ▶ Number or percentage of self-advocates serving in leadership roles.
- ▶ Number of organizations adopting welcoming practices.
- ▶ Number of policy recommendations advanced.
- ▶ Percentage of participants reporting increased knowledge or confidence.

Examples of **qualitative indicators** include:

- ▶ Participant descriptions of increased influence in decision-making.
- ▶ Stakeholder feedback about changes in collaboration or accessibility.
- ▶ Examples of systems change or policy implementation.
- ▶ Case examples showing stronger participation, leadership opportunities, or access.

Figure 2. Differentiating Between Activities, Outputs, and Outcomes



Set Benchmarks, Milestones, or Targets

The evaluation plan can explain how the Council will judge progress over time. This means identifying benchmarks, milestones, or targets where appropriate.

These can remain practical and easy to use. They can provide practical ways to determine whether the Council is on track. Examples include:

- ▶ Annual increase in the number of self-advocates serving on boards or committees.
- ▶ Yearly increase in participation from people and communities the Council wants to reach more effectively.
- ▶ Targeted growth in policy engagement, leadership development, or partnership activity.
- ▶ Milestones for launching, expanding, or improving key strategies.

Benchmarks can be reviewed and adjusted as the Council learns more over time.

Plan How Progress Will Be Monitored

The Council can describe how monitoring will occur in practice. This could include:

- ▶ What information will be tracked for each objective?
- ▶ How often will data be collected or updated?
- ▶ Who is responsible for collecting, organizing, and reviewing information?
- ▶ How will progress be shared with staff, committees, and the full Council?

Monitoring systems can be simple and still be useful. A Council may use spreadsheets, reporting templates, dashboards, grant reports, meeting logs, or other practical systems, as long as the process is clear and consistent.

Review Progress on Priority Areas

When an objective is intended to improve results for a particular population, community, or issue, the evaluation plan can describe how progress will be reviewed over time. This may include:

- ▶ Looking at information by relevant characteristics.
- ▶ Reviewing whether the intended people or communities are being reached.
- ▶ Identifying barriers to access, participation, or benefit.
- ▶ Using what is learned to strengthen the Council's approach.

Figure 3. Implementing the Evaluation Plan



Apply: Define Results and Monitor Progress

Self-Advocacy and Satisfaction Example

A Council with a self-advocacy objective might include key results such as:



- ▶ Increased participation of self-advocates in leadership roles.
- ▶ Increased confidence in speaking up during meetings or public forums.
- ▶ Increased opportunities to shape decisions that affect people with developmental disabilities.
- ▶ Participant ratings on accessibility, welcome, and usefulness of Council-funded activities.

Benchmarks might include yearly growth in leadership participation, regular collection of satisfaction feedback, or milestones tied to expanding meaningful leadership opportunities.

Guiding Questions

- ◆ What changes does the Council expect for each objective?
- ◆ What would short-term progress look like?
- ◆ What would longer-term progress look like?
- ◆ What indicators will show whether the objective is moving forward?
- ◆ What benchmarks or milestones will help the Council judge progress over time?
- ◆ How will progress be monitored consistently during the five-year period?

Helpful Tools

-  [Outcome and Indicator Worksheet](#)
-  [Benchmark and Milestone Planning Tool](#)

STEP 2. DECIDE WHAT THE COUNCIL WILL EVALUATE

Learn: How to Choose Evaluation Priorities

Monitoring helps the Council track progress. Evaluation helps the Council understand how well strategies are working and what results are being achieved beyond routine reporting.

This step offers a practical way to identify priority questions and focus evaluation efforts across the five-year period.

Move Beyond Required Performance Measures

Required performance measures offer one part of the picture. A strong evaluation plan can also show how the Council will learn about broader results.

Examples of questions that may go beyond required measures include:

- ▶ Are Council-supported strategies contributing to meaningful systems change?
- ▶ Are leadership and self-advocacy efforts producing lasting benefits?
- ▶ Are policy and practice changes being implemented and sustained?
- ▶ Are people with disabilities and families experiencing the intended benefits?
- ▶ What factors are helping or limiting progress?

Identify Priority Evaluation Questions

Few Councils will need to evaluate every activity in depth. The plan can highlight a manageable set of priority evaluation questions that matter most.

Good evaluation questions usually focus on one or more of the following:

- ▶ **Implementation:** Were activities carried out as intended?
- ▶ **Reach:** Who participated or benefited, and who did not?
- ▶ **Quality:** How well were activities delivered?
- ▶ **Outcomes:** What changes occurred as a result?
- ▶ **Access and participation:** Are intended populations being reached and benefiting?
- ▶ **Learning and improvement:** What should the Council continue, strengthen, or change?
- ▶ **Systems and policy change:** What broader changes are occurring in systems, practices, or decision-making?

For example:

- ▶ To what extent are Council-supported leadership activities increasing meaningful participation of self-advocates in policymaking?
- ▶ How are Council-funded partnerships contributing to policy or systems improvements?
- ▶ What barriers are limiting progress on a priority objective?

Decide What Needs Deeper Evaluation

Some objectives or strategies may only need routine monitoring. Others may benefit from deeper evaluation because they are:

- ▶ Central to the Council’s goals.
- ▶ Resource-intensive.
- ▶ Innovative or new.
- ▶ Difficult to implement.
- ▶ Especially important for strengthening results in a priority area.
- ▶ Critical to self-advocacy, systems change, or long-term impact.

The evaluation plan can explain how the Council will identify which strategies or objectives will receive more focused attention over the five-year period.

Figure 4. Prioritizing Evaluation Questions



Sequence Evaluation Work Across Five Years

A five-year evaluation plan works well as a strategic roadmap. It does not attempt to fully design every future evaluation in detail all at once. The Council can describe:

- ▶ Which questions or objectives are likely to be reviewed earlier in the five-year period?
- ▶ Which questions may need more attention later, when more implementation experience exists?
- ▶ How will the Council revisit priorities annually as the work evolves?

For example:

- ▶ Year 1 may focus on establishing outputs, outcomes, indicators, baselines, and review processes, while also assessing early implementation.
- ▶ Years 2 and 3 may focus on reach and short-term outcomes.
- ▶ Years 4 and 5 may focus more on deeper outcomes, systems change, sustainability, and lessons learned.

Keep the Evaluation Plan Strategic and Manageable

This step highlights a thoughtful approach to what the Council wants to learn and how that learning can unfold over time.

Apply: Select Priority Evaluation Questions

Self-Advocacy and Satisfaction Example

Examples of evaluation questions in this area include:

- ▶ To what extent are Council-supported activities creating meaningful leadership opportunities for self-advocates?
- ▶ How do self-advocates describe the quality and usefulness of their participation in Council-funded activities?
- ▶ What features of Council-funded projects contribute to stronger satisfaction, engagement, and continued involvement?
- ▶ How are funded activities helping participants move from participation to influence and leadership?

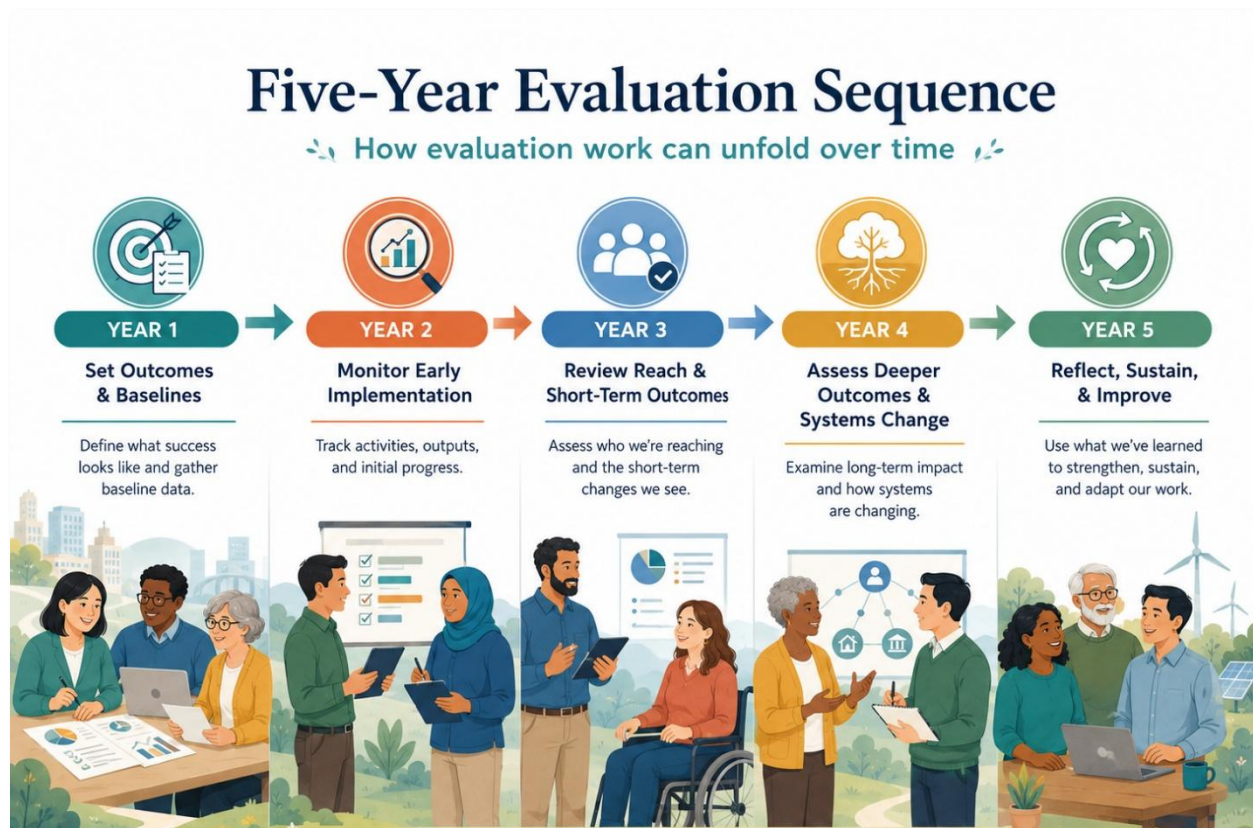
Guiding Questions

- ◆ What does the Council most want to learn over the next five years?
- ◆ Which strategies or objectives are most important to evaluate in greater depth?
- ◆ What evaluation questions would help the Council make better decisions?
- ◆ What results can be examined beyond required performance measures?
- ◆ How will evaluation priorities be sequenced over time?

Helpful Tools

- 📁 Priority Evaluation Question Worksheet
- 📁 Monitoring and Evaluation Planning Matrix

Figure 5. Implementing a Five-Year Evaluation Plan



STEP 3. GATHER INFORMATION IN ACCESSIBLE AND USEFUL WAYS

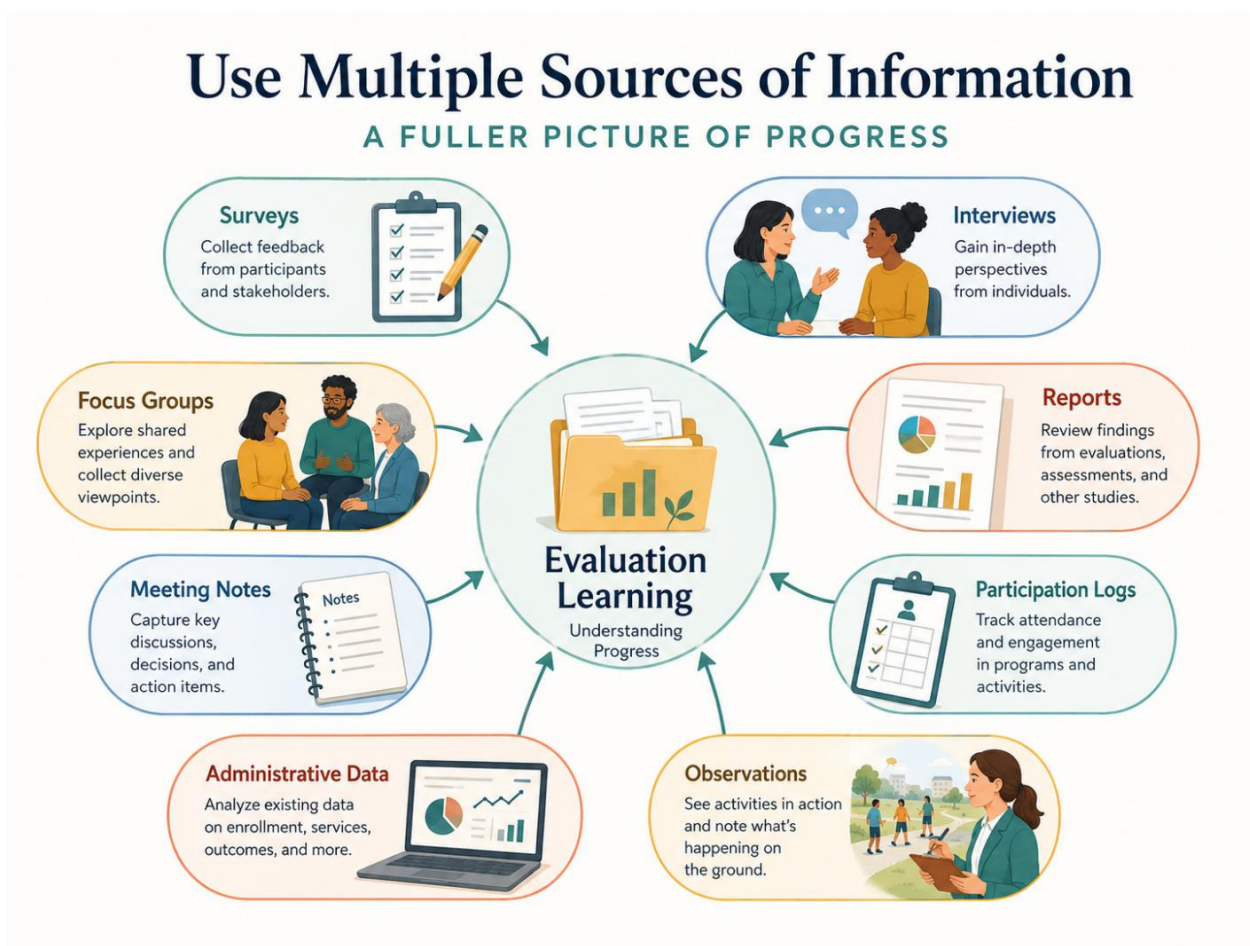
Learn: How to Gather Useful and Accessible Information

A strong evaluation plan can describe how the Council will gather information in ways that are practical, understandable, and responsive to participants' needs.

Use Multiple Sources of Information

Councils often already have useful information through routine operations and reporting. Evaluation plans can make good use of existing information where possible. Using multiple sources can help the Council build a fuller understanding of progress and results.

Figure 6. Types of Information



Use Both Quantitative and Qualitative Information

Quantitative information helps the Council track counts, rates, and trends over time. Qualitative information helps the Council understand experience, context, meaning, and why results look the way they do. A strong evaluation plan often draws from both, with the balance shaped by the objective and the information needed.

For example:

- ▶ Counts of participants, policies influenced, or leadership roles held.
- ▶ Survey ratings of confidence, knowledge, satisfaction, or participation.
- ▶ Stories of how self-advocates used new skills in real settings.
- ▶ Stakeholder reflections on what supported or hindered progress.

Make Evaluation Activities Accessible and Understandable

The plan can clearly describe how evaluation activities will be accessible and understandable for participants. Accessibility can sit at the center of evaluation quality.

Possible strategies include:

- ▶ Using plain language.
- ▶ Offering materials in alternative formats.
- ▶ Providing language access as needed.
- ▶ Allowing multiple ways to respond, such as online, paper, verbal, or assisted response.
- ▶ Designing surveys and discussion questions that are easy to understand.
- ▶ Using familiar settings, trusted facilitators, and appropriate pacing.
- ▶ Offering communication supports or accommodations.

Include Feedback from People Most Affected

The evaluation plan can explain how feedback will be gathered from individuals with developmental disabilities, family members, self-advocates, community partners, and others connected to Council work. Possible approaches include:

- ▶ Advisory input.
- ▶ Structured feedback forms.
- ▶ Listening sessions.
- ▶ Interviews or focus groups.
- ▶ Check-ins during Council-funded activities.
- ▶ Reflection sessions with participants and partners.

The Council can describe how often feedback will be gathered, who will be included, and how that feedback will be used.

Figure 7. Types of Feedback Options



Reduce Burden and Keep Methods Realistic

An evaluation plan gains strength when it is useful, focused, and realistic to carry out. The Council may find it helpful to consider:

- ▶ Information that is already available.
- ▶ New information that is truly needed.
- ▶ The amount of time participants and staff can reasonably contribute.
- ▶ If tools are understandable and manageable.
- ▶ If responsibilities are clearly assigned.

Clarify Roles and Timing

The plan can explain:

- ▶ Who will collect information?
- ▶ Who will organize and review it?
- ▶ How often will it be collected?
- ▶ What role will staff, contractors, grantees, committees, and Council members play?

Apply: Plan Data Collection and Feedback Activities

Self-Advocacy and Satisfaction Example

Information in this area may be gathered through:




- ▶ Brief plain-language satisfaction surveys after trainings, meetings, or leadership activities.
- ▶ Listening sessions with self-advocates about what made participation meaningful.
- ▶ Interviews or focus groups about accessibility, support, participant experience, and perceived impact.
- ▶ Periodic review of whether participants had opportunities to contribute, lead, and influence decisions.

Councils may find it helpful to gather both quick feedback and deeper reflections over time.

Guiding Questions

- ◆ What information does the Council need to answer its priority questions?
- ◆ What information is already available?
- ◆ What new information needs to be collected?
- ◆ How will the Council make evaluation accessible and understandable?
- ◆ How will participant and stakeholder feedback be gathered and included?
- ◆ How will the Council keep the process realistic and manageable?

Helpful Tools

-  [Monitoring and Evaluation Planning Matrix](#)
-  [Accessibility and Stakeholder Feedback Checklist](#)
-  [Self-Advocacy and Satisfaction Feedback Tool](#)

STEP 4. REVIEW FINDINGS, DECIDE WHAT THEY MEAN, AND USE THEM

Learn: How to Review, Interpret, and Use Findings

An evaluation plan continues well beyond data collection. A strong plan shows how information will be reviewed, discussed, interpreted, and used to guide decisions and strengthen future work.

This step helps the Council describe how it will make sense of what it learns and how those findings will be used in practical ways.

Set a Regular Review Process

The Council can describe how staff and Council members will review progress on a regular basis. This may include:

- ▶ Quarterly review of objective-level progress.
- ▶ Annual review of outcomes, benchmarks, and trends.
- ▶ Committee review of focused areas.
- ▶ Full Council discussion of major findings and implications.

A structured review process can make evaluation a routine part of Council oversight and learning.

Review Effectiveness, Not Just Completion

A strong review process looks beyond whether activities happened. It asks whether strategies are producing the intended results. During reviews, the Council may examine:

- ▶ Progress toward benchmarks and targets.
- ▶ Trends over time.
- ▶ Who is being reached and who is not.
- ▶ Barriers to progress.
- ▶ Evidence of systems or policy change.
- ▶ Stakeholder feedback.
- ▶ Unintended outcomes.

This helps the Council understand whether activities are leading to meaningful progress, not just whether they were completed.

Interpret Findings with Context

Findings benefit from thoughtful interpretation. Numbers alone do not explain why progress is strong, weak, or uneven. The Council can describe how it will consider:

- ▶ Implementation context.
- ▶ Changes in the environment or policy setting.
- ▶ Stakeholder perspectives.
- ▶ Accessibility and participation issues.
- ▶ Differences in results across groups or locations.

Interpretation becomes richer when staff, Council members, self-advocates, and other stakeholders help make sense of the findings together.

Use Findings to Guide Decisions and Improvements

A strong evaluation plan can show how the Council will act on what it learns. Possible actions include:

- ▶ Adjusting strategies.
- ▶ Revising benchmarks or timelines.
- ▶ Providing additional support or technical assistance.
- ▶ Changing funding priorities or expectations.
- ▶ Improving accessibility or outreach.
- ▶ Strengthening partnerships.
- ▶ Refining evaluation questions or methods.

This step can make clear that findings will support learning and improvement, as well as reporting

Figure 8. Reviewing Findings



Update the Evaluation Plan Annually

A five-year evaluation plan should remain useful as Council work develops. The Council can describe how the plan will be reviewed and updated each year. Annual review may include:

- ▶ Checking whether evaluation questions are still relevant.
- ▶ Refining indicators or benchmarks.
- ▶ Adjusting methods, timelines, or responsibilities.
- ▶ Identifying new priority questions based on experience and findings.
- ▶ Documenting any changes made to the plan.

Annual updates do not need to make the plan complicated. They should help keep the plan realistic, current, and aligned with what the Council is learning.

Apply: Plan for Review, Use, and Annual Updates

Self-Advocacy and Satisfaction Example

During quarterly or annual review, the Council may look at questions such as:


- ▶ Are self-advocates participating in meaningful ways?
- ▶ Do participants describe activities as accessible, welcoming, and useful?
- ▶ What feedback suggests that leadership opportunities are growing stronger?
- ▶ What changes could improve participant experience, support, or influence?

These discussions can lead to practical improvements in funding decisions, activity design, facilitation, outreach, and leadership development supports.

Guiding Questions

- ◆ How often will staff and Council members review progress?
- ◆ What information will be discussed during those reviews?
- ◆ How will the Council decide whether strategies are effective?
- ◆ How will findings be interpreted with input from relevant stakeholders?
- ◆ How will evaluation results guide decisions and improvements?
- ◆ How will the plan be reviewed and updated annually?

Helpful Tools

-  [Review and Reflection Template](#)
-  [Annual Evaluation Plan Review Checklist](#)

BRINGING THE PLAN TOGETHER

Bring the Parts Together

A five-year evaluation plan can give the Council a clear, credible, and useful approach to track progress, learn from experience, bring in stakeholder perspectives, and strengthen its work overtime.

A practical evaluation plan supports accountability and encourages better decision-making, stronger partnerships, and more meaningful outcomes for people with developmental disabilities and their families.

Keep Self-Advocacy and Satisfaction Visible Throughout the Plan

Self-advocacy and satisfaction can be integrated across the full evaluation plan so they stay visible from beginning to end. This approach connects these topics to outcomes, monitoring, evaluation questions, data collection, and use of findings.

Councils can weave these topics throughout the plan by:

- ▶ In **Step 1**, include self-advocacy and satisfaction indicators within objective-level outcomes, key results, and benchmarks.
- ▶ In **Step 2**, include evaluation questions about leadership, voice, participation, influence, accessibility, quality, and participant experience.
- ▶ In **Step 3**, describe how feedback from self-advocates and participants will be gathered in accessible ways.
- ▶ In **Step 4**, describe how findings about self-advocacy and satisfaction will be reviewed, discussed, and used to strengthen Council work.

A short callout, summary box, or example table can also help readers find these elements quickly.

Keep the Plan Practical Over Five Years

A strong evaluation plan can guide action while leaving room for learning, growth, and refinement. To keep the plan practical, Councils can:

- ▶ Focus on outcomes and meaningful results, not just activity counts.
- ▶ Choose a manageable number of priority evaluation questions.
- ▶ Use information that is realistic to collect and review.
- ▶ Make accessibility and stakeholder participation explicit.
- ▶ Align review cycles with actual Council decision-making.
- ▶ Treat the plan as a living document that can be refined over time.

Together, these practices can help the Council use evaluation not only for reporting, but also for reflection, improvement, and stronger results over the full five-year period.

Apply: Check the Full Plan

Guiding Questions

- ◆ Does the evaluation plan clearly connect outcomes, evaluation questions, information-gathering methods, review processes, and use of findings?
- ◆ Are self-advocacy and satisfaction visible across outcomes, questions, feedback activities, and review discussions?
- ◆ Is the plan realistic for staff, Council members, contractors, grantees, and participants to carry out?
- ◆ Are accessibility and stakeholder participation built into the plan from beginning to end?
- ◆ Does the plan focus on the most important learning needs rather than trying to evaluate everything?
- ◆ How will the Council keep the plan useful and manageable over the full five-year period?

Helpful Tool

- 📅 [Annual Evaluation Plan Review Checklist](#)

Figure 9. Annual Evaluation Plan Review



RESOURCES

The following resources are provided:

RESOURCE	DESCRIPTION	RELEVANT STEP
Outcome and Indicator Worksheet	Identifies outcomes, indicators, and data sources for tracking progress.	Step 1
Benchmark and Milestone Planning Tool	Supports development of benchmarks, milestones, and targets over time.	Step 1
Priority Evaluation Question Worksheet	Guides identification of priority evaluation questions and learning areas.	Step 2
Monitoring and Evaluation Planning Matrix	Organizes evaluation questions, data collection activities, timelines, and use of findings.	Step 2 & Step 3
Accessibility and Stakeholder Feedback Checklist	Provides a checklist for accessible, inclusive, and participant-informed evaluation activities.	Step 4
Review and Reflection Template	Structures regular review of findings, progress, and opportunities for improvement.	Step 4
Self-Advocacy and Satisfaction Feedback Tool	Collects feedback about participant experience, accessibility, and engagement.	Step 4
Annual Evaluation Plan Review Checklist	Supports annual review and updating of the evaluation plan.	Step 4 & Bringing the Plan Together

Outcome and Indicator Worksheet

Purpose

This worksheet helps Councils identify meaningful outcomes and select indicators that can be used to monitor progress over time.

Type of Outcome (Short-Term, Intermediate, Long-Term)	Outcome	Quantitative Indicator	Qualitative Indicator	Data Source
Objective 1:				
Objective 2:				
Objective 3:				

Quick Check

- Are outcomes written as changes?
- Do indicators match the outcomes?
- Are the indicators realistic to track?

Benchmark and Milestone Planning Tool

Purpose

This tool helps Councils establish practical benchmarks, milestones, and annual targets that support ongoing monitoring and learning.

Indicator	Baseline	Milestones / Targets				
		Year 1	Year 2	Year 3	Year 4	Year 5
Objective 1:						
Objective 2:						
Objective 3:						

Quick Check

- Are targets realistic?
- Do milestones show meaningful progress?
- How will the Council review targets over time?

Priority Evaluation Question Worksheet

Purpose

This worksheet helps Councils identify the most important evaluation questions to explore during the five-year period.

Step 1. Identify the Focus Area

What strategy, objective, or area of work does the Council want to evaluate more deeply?

Step 2. Clarify the Learning Purpose

What does the Council most want to learn?

Step 3. Draft Priority Evaluation Questions

Implementation Questions:

Reach Questions:

Outcome Questions:

Access and Participation Questions:

Learning and Improvement Questions:

Systems and Policy Change Questions:

Quick Check

- Are the questions realistic to answer?
- Will the findings help improve Council work?
- Are the questions focused and useful?

Accessibility and Stakeholder Feedback Checklist

Purpose

This checklist helps Councils ensure evaluation activities are accessible, understandable, and inclusive.

Accessibility

- Plain-language materials are used.
- Multiple options are available (online, paper, verbal, assisted response).
- Materials are available in multiple formats if needed.
- Help and assistance are available if needed.
- Surveys and discussion questions are easy to understand.
- Meetings or interviews are held in accessible and welcoming environments.
- Accommodations and communication supports are available.

Stakeholder Engagement

- Self-advocates are included in feedback activities.
- Family members and partners have opportunities to provide input.
- Participants understand how feedback will be used.
- Feedback opportunities occur regularly.
- The Council reviews feedback and uses it to guide improvements.

Quick Check

- Are activities accessible?
- Are self-advocates and partners included?
- How will feedback be used?

Review and Reflection Template

Purpose

This template helps Councils regularly review progress, reflect on findings, and identify opportunities for learning and improvement.

Review Information

Review Date: _____

Review Frequency: Quarterly Annually

Review Type: Committee Review Full Council Review Other

Participants Involved in Review:

Progress Review

What progress has been made toward benchmarks, targets, or intended outcomes?

What trends or patterns are emerging over time?

Reach and Participation

Who is being reached or benefiting?

Are there groups or communities that are not being reached as intended?

Effectiveness and Quality

What seems to be working well?

What barriers or challenges are limiting progress?

Were there any unexpected or unintended outcomes?

Systems, Policy, or Practice Change

Is there evidence of changes in systems, partnerships, policies, or practices?

Reflection and Next Steps

What should continue?

What should be strengthened, adjusted, or improved?

Are additional supports, resources, or follow-up actions needed?

Quick Check

- Did the review focus on outcomes, not just completed activities?
- Were stakeholder perspectives included?
- Were decisions or next steps clearly identified?

Self-Advocacy and Satisfaction Feedback Tool

Purpose

This plain-language tool helps Councils gather feedback about participant experience, accessibility, engagement, and leadership opportunities.

Self-Advocate / Participant Feedback Questions

Please circle your response.

1. I felt welcomed and respected. 😊 Yes 😞 No 😐 Not Sure
2. The activity was understandable and accessible. 😊 Yes 😞 No 😐 Not Sure
3. I had opportunities to participate and share my ideas. 😊 Yes 😞 No 😐 Not Sure
4. I learned something useful. 😊 Yes 😞 No 😐 Not Sure
5. I feel more confident participating in leadership, advocacy, or decision-making activities. 😊 Yes 😞 No 😐 Not Sure

6. What went well?

7. What could we make better?

8. Do you have anything else to share?

Annual Evaluation Plan Review Checklist

Purpose

This checklist helps Councils review and update the evaluation plan each year so it remains useful, practical, and aligned with Council priorities.

Evaluation Questions and Priorities

- Evaluation questions still reflect current Council priorities.
- Priority areas for evaluation are still appropriate.
- New learning needs, challenges, or emerging issues have been identified.
- Evaluation priorities for the coming year are clear.

Outcomes, Indicators, and Benchmarks

- Outcomes still reflect the changes the Council hopes to achieve.
- Indicators remain meaningful and realistic to track.
- Benchmarks, milestones, or targets still make sense.
- Progress is being regularly reviewed.

Monitoring and Data Collection

- Monitoring processes are happening consistently.
- Data collection methods remain practical and manageable.
- Roles and responsibilities are still clear.
- Information is being collected often enough to support decision-making.

Accessibility and Stakeholder Involvement

- Evaluation activities remain easy to access and understand.
- Self-advocates, families, and partners have opportunities to provide feedback.
- Everyone's perspectives are included when reviewing findings.
- Feedback is being used to strengthen Council work.

Review and Use of Findings

- Council staff and members review findings regularly.
- The process looks at outcomes, trends, barriers, and participation.
- Evaluation findings are being used to guide decisions and improvements.

Plan Updates and Documentation

- Changes to the evaluation plan have been noted.
- Timelines, responsibilities, or methods have been updated if needed.
- Revised versions of the plan have been shared the right people.

Reflection Questions

- What parts of the evaluation plan are working well?
- What areas need to be strengthened or updated?
- What additional supports or resources may be needed moving forward?

