PROGRAM EVALUATIONS SUMMARY METAEVALUATION CHECKLIST
(Based on *The Program Evaluation Standards*)
Daniel L. Stufflebeam and Social Impact
2012

This summary checklist is for performing final, summative metaevaluations. It is organized according to the Joint Committee Program Evaluation Standards. For each of the standards the most important checkpoints are indicated. It is suggested that each standard be scored on each checkpoint. Then judgments about the adequacy of the subject evaluation in meeting the standard can be made as follows: 0-2 Poor, 3-4 Fair, 5-6 Good, 7-8 Very Good, 9-10 Excellent. It is recommended that an evaluation be failed if it scores Poor on standards P1 Responsive and Inclusive Orientation, A1 Justified Conclusions and Decisions, A2 Valid Information, or A8 Communication and Reporting. Users of this checklist are advised to consult the full text of The Joint Committee on Standards for Educational Evaluation (2011), *The Program Evaluation Standards: A Guide for Evaluators and Evaluation Users*, Thousand Oaks, CA: Sage Publications.

**TO MEET THE REQUIREMENTS FOR UTILITY, PROGRAM EVALUATIONS SHOULD:**

### U1 Evaluator Credibility

- Engage evaluator whom the stakeholders trust
- Engage evaluators who are appropriately responsive to issues of gender, socioeconomic status, race, and language and cultural differences
- Assure that the evaluation plan responds to key stakeholders' concerns
- Attend appropriately to stakeholders' criticisms and suggestions
- Keep interested parties informed about the evaluation’s progress

<table>
<thead>
<tr>
<th>9-10 Excellent</th>
<th>7-8 Very Good</th>
<th>5-6 Good</th>
<th>3-4 Fair</th>
<th>0-2 Poor</th>
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### U2 Attention to Stakeholders

- Clearly identify the evaluation client
- Consult potential stakeholders to identify their information needs
- With the client, rank stakeholders for relative importance
- Arrange to involve stakeholders throughout the evaluation
- Address stakeholders’ evaluation needs

<table>
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<th>9-10 Excellent</th>
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### U3 Negotiated Purposes

- Monitor and describe how the evaluation’s purposes stay the same or change over time
- As appropriate, update evaluation procedures to accommodate changes in the evaluation’s purposes
- Record the actual evaluation procedures, as implemented
- Describe the evaluation’s purposes and procedures in the summary and full-length evaluation reports

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### U4 Explicit Values
Consider alternative sources of values for interpreting evaluation findings
- Reference pertinent laws
- Reference, as appropriate, the relevant institutional mission
- Reference the program’s goals
- As appropriate, present alternative interpretations based on conflicting but credible value bases

| 9-10 Excellent | 7-8 Very Good | 5-6 Good | 3-4 Fair | 0-2 Poor |

### U5 Relevant Information

- Interview stakeholders to determine their different perspectives
- Assign priority to the most important questions
- Allow flexibility for adding questions during the evaluation
- Obtain sufficient information to address the stakeholders’ most important evaluation questions
- Obtain sufficient information to assess the program’s merit and worth

| 9-10 Excellent | 7-8 Very Good | 5-6 Good | 3-4 Fair | 0-2 Poor |

### U6 Meaningful Processes and Products

- Clearly report the essential information
- Issue brief, simple, and direct reports
- Focus reports on contracted questions
- Describe the evaluation’s purposes, procedures, and findings
- Support conclusions and recommendations
- Provide an executive summary

| 9-10 Excellent | 7-8 Very Good | 5-6 Good | 3-4 Fair | 0-2 Poor |

### U7 Timely and Appropriate Communicating and Reporting

- Make timely interim reports to intended users
- Deliver the final report when it is needed
- Have timely exchanges with the program’s staff
- Have timely exchanges with the program’s customers
- Keep the presentations appropriately brief

| 9-10 Excellent | 7-8 Very Good | 5-6 Good | 3-4 Fair | 0-2 Poor |

### U8 Concern for Consequences and Influence

- Encourage and support stakeholders’ use of the findings
- Provide interim reports
- Make sure that reports are open, frank, and concrete
- Supplement written reports with ongoing oral communication
- Conduct feedback workshops to go over and apply findings

| 9-10 Excellent | 7-8 Very Good | 5-6 Good | 3-4 Fair | 0-2 Poor |
### Scoring the Evaluation for UTILITY

Add the following:

<table>
<thead>
<tr>
<th>Number of Excellent ratings (0-8)</th>
<th>Number of Very Good (0-8)</th>
<th>Number of Good (0-8)</th>
<th>Number of Fair (0-8)</th>
<th>Total Score:</th>
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<td>____ ____ x 3 = ____ ____ ____</td>
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<table>
<thead>
<tr>
<th>Strength of the evaluation’s provisions for UTILITY</th>
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<tbody>
<tr>
<td>□ 30 (93%) to 32: Excellent</td>
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<tr>
<td>□ 22 (68%) to 29: Very Good</td>
</tr>
<tr>
<td>□ 16 (50%) to 21: Good</td>
</tr>
<tr>
<td>□ 8 (25%) to 15: Fair</td>
</tr>
<tr>
<td>□ 0 (0%) to 7: Poor</td>
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\[
\text{(Total score) + 12 = ____ \times 100 = ____} 
\]

### TO MEET THE REQUIREMENTS FOR FEASIBILITY, PROGRAM EVALUATIONS SHOULD:

#### F1 Project Management

☐ Consistently relate to all stakeholders in a professional manner
☐ Minimize disruption
☐ Honor participants’ privacy rights
☐ Be alert to and address participants’ concerns about the evaluation
☐ Do not ignore or help cover up any participant’s incompetence, unethical behavior, fraud, waste, or abuse

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#### F2 Practical Procedures

☐ Tailor methods and instruments to information requirements
☐ Minimize the data burden
☐ Appoint competent staff
☐ Choose procedures in light of known constraints
☐ Make a realistic schedule
☐ Engage locals to help conduct the evaluation

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#### F3 Contextual Viability

☐ Avert or counteract attempts to bias or misapply the findings
☐ Agree on editorial and dissemination authority
☐ Report divergent views

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#### F4 Resource Use

☐ Be efficient
☐ Inform decisions
☐ Foster program improvement
☐ Generate new insights
☐ Minimize time demands on program personnel

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Program Evaluations Metaevaluation Checklist
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### Scoring the Evaluation for FEASIBILITY

**Add the following:**

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<tr>
<th>Provision</th>
<th>Number of Excellent (0-4)</th>
<th>Number of Very Good (0-4)</th>
<th>Number of Good (0-4)</th>
<th>Number of Fair (0-4)</th>
<th>Total Score</th>
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<tr>
<td>FEASIBILITY</td>
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<td>_____ x 3 = ____</td>
<td>_____ x 2 = ____</td>
<td>_____ x 1 = ____</td>
<td>= ____</td>
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**Strength of the evaluation’s provisions for FEASIBILITY:**

- □ 15 (93%) to 16: Excellent
- □ 11 (68%) to 14: Very Good
- □ 8 (50%) to 10: Good
- □ 4 (25%) to 7: Fair
- □ 0 (0%) to 3: Poor

(____) x 100 = ____

### TO MEET THE REQUIREMENTS FOR PROPRIETY, PROGRAM EVALUATIONS SHOULD:

#### P1 Responsive and Inclusive Orientation

- □ Assess program outcomes against targeted customers’ assessed needs
- □ Make the evaluation’s service orientation clear to stakeholders
- □ Identify program strengths to build on
- □ Identify program weaknesses to correct

#### P2 Formal Agreements, reach advance written agreements on:

- □ Evaluation purpose and questions
- □ Evaluation reports
- □ Release of reports
- □ Evaluation procedures and schedule
- □ Confidentiality/anonymity of data
- □ Evaluation resources

#### P3 Human Rights and Respect

- □ Clarify intended uses of the evaluation
- □ Keep stakeholders informed
- □ Respect diversity
- □ Honor confidentiality/anonymity agreements
- □ Do no harm

#### P4 Clarity and Fairness

- □ Assess and report the program’s strengths
- □ Assess and report the program’s weaknesses
- □ Report on intended outcomes
- □ Report on unintended outcomes
Appropriately address criticisms of the draft report

Estimate and report the effects of the evaluation’s limitations on the overall judgment of the program

9-10 Excellent  7-8 Very Good  5-6 Good  3-4 Fair  0-2 Poor

P5 Transparency and Disclosure

- Report all findings in writing
- Report relevant points of view of both supporters and critics of the program
- Report balanced, informed conclusions and recommendations
- Show the basis for the conclusions and recommendations
- Disclose the evaluation’s limitations

9-10 Excellent  7-8 Very Good  5-6 Good  3-4 Fair  0-2 Poor

P6 Conflicts of Interests

- Identify potential conflicts of interest early in the evaluation
- Provide written, contractual safeguards against identified conflicts of interest
- Engage multiple evaluators
- Maintain evaluation records for independent review
- When appropriate, release evaluation procedures, data, and reports for public review

9-10 Excellent  7-8 Very Good  5-6 Good  3-4 Fair  0-2 Poor

P7 Fiscal Responsibility

- Specify and budget for expense items in advance
- Keep the budget sufficiently flexible to permit appropriate reallocations to strengthen the evaluation
- Obtain appropriate approval for needed budgetary modifications
- Maintain accurate records of sources of funding and expenditures
- Maintain adequate personnel records concerning job allocations and time spent on the job
- Be frugal in expending evaluation resources

9-10 Excellent  7-8 Very Good  5-6 Good  3-4 Fair  0-2 Poor

Scoring the Evaluation for PROPRIETY

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<tbody>
<tr>
<td>Number of Excellent ratings (0-7)______ x 4 =_______</td>
<td>□ 26 (93%) to 28: Excellent</td>
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<tr>
<td>Number of Very Good (0-7)______ x 3 =_______</td>
<td>□ 19 (68%) to 25: Very Good</td>
</tr>
<tr>
<td>Number of Good (0-7)______ x 2 =_______</td>
<td>□ 14 (50%) to 18: Good</td>
</tr>
<tr>
<td>Number of Fair (0-7)______ x 1 =_______</td>
<td>□ 7 (25%) to 13: Fair</td>
</tr>
<tr>
<td>Total Score: =_______</td>
<td>□ 0 (0%) to 6: Poor</td>
</tr>
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(Total score) + 12 = ______ x 100

TO MEET THE REQUIREMENTS FOR ACCURACY, PROGRAM EVALUATIONS SHOULD:

A1 Justified Conclusions and Decisions
1. Focus conclusions directly on the evaluation questions
2. Accurately reflect the evaluation procedures and findings
3. Limit conclusions to the applicable time periods, contexts, purposes and activities
4. Cite the information that supports each conclusion
5. Report plausible alternative explanations of the findings
6. Explain why rival explanations were rejected

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### A2 Valid Information

1. Focus the evaluation on key questions
2. As appropriate, employ multiple measures to address each question
3. Train and calibrate the data collectors
4. Document and report the data collection conditions and process
5. Document how information from each procedure was scored, analyzed, and interpreted
6. Assess and report the comprehensiveness of the information provided by the procedures as a set in relation to the information needed to answer the set of evaluation questions

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### A3 Reliable Information

1. In reporting reliability of an instrument, assess and report the factors that influenced the reliability, including the characteristics of the examinees, the data collection conditions, and the evaluator’s biases
2. Train and calibrate scorers and analysts to produce consistent results
3. Pilot test new instruments in order to identify and control sources of error
4. As appropriate, engage and check the consistency between multiple observers
5. Acknowledge reliability problems in the final report

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### A4 Explicit Program and Content Descriptions

1. Collect descriptions of the intended program from the client and various stakeholders
2. Maintain records from various sources of how the program operated
3. As feasible, engage independent observers to describe the program’s actual operations
4. Describe how the program actually functioned
5. Analyze discrepancies between how the program was intended to operate and how it actually operated

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### A5 Information Management

1. Obtain information from a variety of sources
2. As appropriate, employ a variety of data collection methods
3. Document, justify, and report the criteria and methods used to select information sources
4. Document, justify, and report the means used to obtain information from each source

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</table>
Include data collection instruments in a technical appendix to the evaluation report
Systematize and control storage of the evaluation information

9-10 Excellent  7-8 Very Good  5-6 Good  3-4 Fair  0-2 Poor

A6 Sound Designs and Analyses

Establish protocols for quality control of the evaluation information
Train the evaluation staff to adhere to the data protocols
Systematically check the accuracy of scoring and coding
When feasible, use multiple evaluators and check the consistency of their work
Choose procedures appropriate for the evaluation questions and nature of the data
Obtain information keyed to the important evaluation questions

9-10 Excellent  7-8 Very Good  5-6 Good  3-4 Fair  0-2 Poor

A7 Explicit Evaluation Reasoning

Employ multiple analytic procedures to check on consistency and replicability of findings
Examine variability as well as central tendencies
Identify and examine outliers and verify their correctness
Use visual displays to clarify the presentation and interpretation of statistical results
Derive conclusions and recommendations and demonstrate their meaningfulness

9-10 Excellent  7-8 Very Good  5-6 Good  3-4 Fair  0-2 Poor

A8 Communication and Reporting

Safeguard reports from deliberate or inadvertent distortions
Report perspectives of all stakeholder groups
Report alternative plausible conclusions
Describe steps taken to control bias
Participate in public presentations of the findings to help guard against and correct distortions by other interested parties

9-10 Excellent  7-8 Very Good  5-6 Good  3-4 Fair  0-2 Poor

Scoring the Evaluation for ACCURACY
Add the following: ACCURACY

Strength of the evaluation’s provisions for ACCURACY

□ 30 (93%) to 32: Excellent
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□ 0 (0%) to 7: Poor

Total Score: =_______

(Total score) ÷ 44 = _____ x 100 = _______

TO MEET THE REQUIREMENTS FOR EVALUATION ACCOUNTABILITY, PROGRAM EVALUATIONS SHOULD:

E1 Evaluation Documentation
Collect descriptions of the implemented evaluation designs
Collect descriptions of the evaluation procedures
Fully record all data collected
Analyze the data and record outcomes
Produce a technical report that provides information on the evaluation design, procedures, data and outcomes

9-10 Excellent 7-8 Very Good 5-6 Good 3-4 Fair 0-2 Poor

**E2 Internal Metaevaluation**

- Designate or define the standards to be used in judging the evaluation
- Assign someone responsibility for documenting and assessing the evaluation process and products
- Budget appropriately and sufficiently for conducting the metaevaluation

9-10 Excellent 7-8 Very Good 5-6 Good 3-4 Fair 0-2 Poor

**E3 External Metaevaluation**

- Budget appropriately and sufficiently for conducting the metaevaluation
- Maintain a record of all metaevaluation steps, information and analyses

9-10 Excellent 7-8 Very Good 5-6 Good 3-4 Fair 0-2 Poor

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<tr>
<td>Add the following:</td>
<td>□ 11 (93%) to 12: Excellent</td>
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<tr>
<td>Number of Excellent ratings (0-3) x 4 = _____</td>
<td>□ 8 (68%) to 10: Very Good</td>
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<tr>
<td>Number of Very Good (0-3) x 3 = _____</td>
<td>□ 6 (50%) to 7: Good</td>
</tr>
<tr>
<td>Number of Good (0-3) x 2 = _____</td>
<td>□ 3 (25%) to 5: Fair</td>
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<tr>
<td>Number of Fair (0-3) x 1 = _____</td>
<td>□ 0 (0%) to 2: Poor</td>
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<td>Total Score: = _____</td>
<td>_____ (Total score) + 12 = _____ x 100 = _____</td>
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