

Best Practices for Writing Strong Evaluation Plans for Grant Proposals

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Vikram Koundinya, UCCE Evaluation Specialist & Assoc. Professor of Extension

Samuel Ikendi, Academic Coordinator, Climate Smart Agriculture Programs, UC Agriculture and Natural Resources

Greta Landis, Evaluation & Research Specialist, Natural Resources Institute, University of Wisconsin-Madison, Division of Extension

Agenda

- Anticipated learning outcomes
- 12 best practices
- Examples for the 12 best practices
- Evaluation plan from a currently funded project
- Participant activity & Q/A
- Additional resources & Training evaluation

Anticipated Learning Outcomes

Participants will gain understanding of:

1. Why it is important to develop a strong evaluation plan in a grant proposal.
2. Best practices for writing evaluation plans in grant proposals.
3. Real life examples for the best practices.
4. How a strong evaluation plan is written and implemented.

Introduction

- An evaluation plan is often a required component of grant proposals.
- A robust evaluation plan helps funding agencies assess if the grants they award are accomplishing their goals (USDA Office of Budget and Program Analysis, 2022; NSF, 2023).
- Funders expect a clearly articulated evaluation plan and assign points for that in the overall grant proposal assessment.
- Most of the RFPs provide guidance on what to include in the evaluation section, but there are instances where this guidance is vague or missing.

Introduction

- A robust evaluation plan can increase the chances of funding by signaling to grant reviewers that the project team is committed to accountability, learning, and improvement (Israel, 2024).
- Literature is replete with grant writing best practices, but not much specifically on writing strong evaluation plans.
- A strong evaluation plan articulates connections between the proposed project inputs, activities, outputs or products, anticipated outcomes and the impacts reflected in a project logic model.

12 Best Practices

1. Understand how outputs are different from outcomes.
2. Clearly differentiate short-, medium-, and long-term outcomes and where needed, *operationally define* what an outcome means for the context of your study.
3. Include *indicators* for every outcome.
4. Define “*success*” for the proposed project.
5. For each outcome, indicate the *method* you will use to collect data.
6. Use *plausible logic* for the connections between short-, medium-, and long-term outcomes.

12 Best Practices

7. The *evaluation budget should be appropriate* to the activities and methods you propose to collect outcomes data and develop evaluation reports.
8. Have both *formative and summative* evaluation components.
9. Indicate *who will be responsible* for carrying out each evaluation task.
10. Have *literature support* to show which evaluation framework you are using for the study.
11. Work with the *evaluator* from the *grant ideation stage*.
12. Include a *dissemination plan and communication strategy*.

1. Understand how outputs are different from outcomes

Description

Proposals are judged by their likely outcomes and impact, not outputs.

Outputs are:

- activities conducted, e.g., research, workshops) and
- products created, e.g., brochures.

Outcomes are:

- changes happening due to activities.
- influence behavioral change.

Examples

Output: Participants in nutrition education received a brochure on how low-sodium foods are good for cardiovascular health.

Outcome: 85% of participants in nutrition education **will increase** their awareness of low-sodium foods from low to high level,

- measured on a retrospective post-then-pre survey.

2. Clearly differentiate short-, medium-, and long-term outcomes (and operationally define what an outcome means for the context of your study)

Description

Some **RfPs** outline what to include under outputs and outcomes.

- Level of outcomes has an impact on evaluation budgets.

Short-term: learning, skill development, and changes in attitudes.

Medium-term: behavior change, adoption

Long-term: changes happening beyond participants – whole community.

Examples

Short-term: Manure workshops

- increased knowledge about soil and optimal spreading conditions.

Medium-term: Community Gardens

- adoption of routine meal planning with vegetables and improved nutrition.

Long-term: Public Health Programs

- improved community wellbeing
- decreased public health costs.

3. Include indicators for every outcome

Description

Indicators are the evidence or information that represent the variables or outcomes you want to measure.

- Defines how the outcome will be measured and interpreted.
- Indicator criteria should be direct, specific, useful, practical, adequate, and culturally appropriate.

Examples

Maternal Nutrition Programs

- Body Mass Index below 18.5 Kg/M² indicating a healthy reproductive mother (WHO, 2003).

Master Naturalist Training

- Participants self-reporting 'knowledge gain' about wildlife habitat types from before to after attending the training.

4. Define “success” for the proposed project

Description

Specify the level of accomplishment in outcomes you anticipate happening,

- what success means to program leaders and participants.

Collecting baseline data

- related to anticipated outcomes will enable evaluators to quantify outcome changes at the end of the program.

Examples

In our Climate Education Program **Success** was defined as 75% of farmers self-reporting ‘knowledge gain’ on drought management from pre-to-post training.

Needs assessment data were used to determine the level of climate threat and the need for education.

Needs were prioritized, education programs implemented, and knowledge on every theme was assessed.

5. For each outcome, indicate the method you will use to collect data

Description

Having mixed and multiple methods

- triangulate the findings from different sources - credibility.

Use participatory and culturally responsive data collection methods:

- enhances trust with evaluation participants
- demonstrate focus on accuracy
- usability of evaluation findings to potential funders.

Examples

Conservation agricultural practices and water quality, we might see:

Short-term: assessing knowledge change

- post-training surveys or feedback activities, participant observation.

Medium-term: tracking change in behavior

- leadership in local watershed groups, participation in water quality field days, and network analyses.

Long-term: changes in the community

- acreage enrolled in conservation, regional water quality data, and oral histories

6. Use plausible logic for the connections between short-, medium-, and long-term outcomes

Description

The assumptions and rationale that connect short- and long-term outcomes communicate to funders why those outcomes are likely to occur

- Short-term to medium-term, to long-term outcomes or anticipated impact.
- Developing program logic model based on a Theory of Change

Examples

Environmental education and research center uses place-based learning

Short-term: science literacy, increased environmental awareness.

Medium term: increase engagement and build relationships among participants,

Long-term: increased environmental advocacy and empowerment in community

7. The evaluation budget should be appropriate to the activities and methods you propose to collect outcomes data and develop evaluation reports

Description

10% of grant budget - appropriate for implementing a comprehensive evaluation plan.

- Commensurate with the design, program expectations, and populations served.

To measure short-term outcomes, a smaller budget may be sufficient,

- long-term: more funds

Examples

Evaluation budget for a multi-site, multi-year curriculum development program for sustainable forest management could include

- staff time for data collection,
- analysis and reporting,
- travel costs,
- supplies for facilitation,
- payment for participants in focus groups.

8. Have both formative and summative evaluation components

Description

Formative evaluation - process evaluation leading to outcome.

- Finding out the negative and positive factors linked to the program and seeking changes

Summative evaluation - shows whether the proposed program objectives are met.

- assessing the value of the program in terms of impact, accountability

Examples

4-H program

Formative evaluation

- could solicit feedback from youth on the programs that fit their interests

Summative evaluation

- determines how those programs influenced youth leadership skills and career development.

9. Indicate who will be responsible for carrying out each evaluation task

Description

Having an evaluator with appropriate experience to carry out the proposed evaluation plan greatly enhances the chances of funding and success.

Grant Reviewers' view of Evaluators

- enhances the credibility for evaluation
- builds confidence among reviewers on the possibility of accomplishing project goals.

Examples

A data collection plan in an animal science program could include

- training students to interview their peers,
- surveys of teachers
- laboratory technicians developed by the evaluator.

10. Have literature support to show which evaluation framework you are using for the study

Description

Clearly describe the type of evaluation framework and why.

Some frameworks that are suitable for extension education and applied research work are:

- participatory evaluation,
- culturally responsive evaluation,
- developmental evaluation, and
- objectives-oriented evaluation.

Examples

Extension programs working with indigenous communities to host a tribal leadership summit could use:

- culturally appropriate,
- trauma-informed evaluation

using holistic and strengths-based frameworks to empower community leaders in evaluation planning and data analysis.

11. Work with the evaluator from the grant ideation stage

Description

Share the full proposal draft and Request For Proposal with evaluators

- to know the big picture and develop an evaluation plan that meaningfully connects all the outcomes.

Lack of evaluators leads to unrelated tasks

- Main reason - if an evaluator was brought into the team at the last-minute.

Examples

Evaluator involvement in a proposal to expand citizen scientist water monitoring program strengthens evaluation plan by

- providing the evaluator with increased understanding of the organization and its constraints,
- key terminology or subject area expertise
- adds cohesion between activities.

12. Include a dissemination plan and communication strategy

Description

Many funding agencies require that a plan be developed to disseminate the evaluation findings of the project.

Some strategies to do this include:

- development of extension materials,
- peer-reviewed publications,
- conference presentations,
- project websites with evaluation products and findings.

Examples

Evaluation of a sustainable agricultural research grant program includes:

- plan to disseminate results on a website hosted by the project,
- series of webinars with farmer audiences,
- final presentation to project leadership on findings and recommendations
- plans for peer-reviewed publications.

Writing (and then adapting) strong evaluation plans:

An example from the USDA-NIFA Sustainable Agricultural Systems (SAS) Program

“SAS funds projects that use **transdisciplinary approaches** to create outcomes and impacts that **transform, preserve, and grow food, agricultural, and forestry systems** in the United States. Funded projects increase productivity while creating jobs and promoting rural prosperity”

(Program description, April 2025)



← More information about the SAS program [here](#)



Project team members and kids look over rotationally grazed pasture. Photo credit: Ariel Leon, *Grassland 2.0* (award no. 2019-68012-29852)



Installing solar panels in agrivoltaic systems
Photo credits: *SCAPES project*
(award no. 2020-68012-31934)

Writing (and then adapting) strong evaluation plans:

An example from the USDA-NIFA Sustainable Agricultural Systems (SAS) Program

- **56** funded projects with budgets from \$5-10 million hosted at
- **38** academic institutions (with over **400** collaborator institutions and partner organizations)
- across more than **30** states
- representing more than **\$525,000,000** in public investment



← More information about the SAS program [here](#)



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Our evaluation team provides evaluation support for **four SAS projects**...

- Grassland 2.0 - 2018-09009
- Kernza CAP - 2019-08284
- Resilience CAP - 2021-05722
- Agrivoltaics - 2021-05691

... and leads one SAS Program Evaluation project



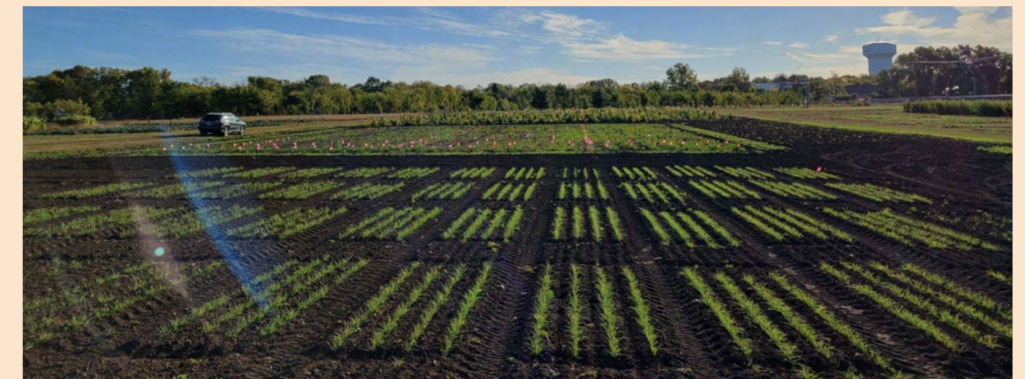
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Kernza®CAP SAS proposal

- 2020 - 2025
- 50+ organizations and institutions

University of Minnesota and The Land Institute-led project exploring the uses and agronomic properties of perennial intermediate wheatgrass

Kernza® is a perennial grain used for baked goods, pasta, spirits, beers, or enjoyed as a whole grain like rice and pearly barley. Unlike traditional annual grains, Kernza® thrives for multiple years without replanting, reducing tillage and other resource-intensive inputs. Its extensive root system, which can reach over ten feet underground, prevents soil erosion, cleans water, and improves soil health.



← More information about the Kernza project [here](#)

Perennial crops display and a field trial of planted Kernza
Photo credits: *Kernza®CAP project* (award no. 2019-08284)

Evaluation plan requirements in a proposal

Language from the USDA-NIFA SAS call for proposals:

“A Management Plan (see Part IV, C. 3. f. “Field 12. Other Attachments” for additional information) **must** include project governance, a stakeholder advisory board, involvement of an external evaluator, and progress reporting. The plan must clearly articulate with an organizational chart how the project will be governed. A well-thought out strategy must be put in place to enhance coordination, collaboration, communication, data sharing and reporting among members of the project team and stakeholder groups. The management plan must include an advisory group of principal stakeholders, partners, and professionals to assess and evaluate the quality, expected measurable outcomes, and potential impacts for the proposed research, education and extension. An external evaluator must be employed, with a specified amount of funding set aside for evaluation support. Success in meeting objectives must be demonstrated through proposed project metrics. **Reporting requirements must include a description of key achievements including the publicly available and compatible technologies, information, and data products**”

Evaluation plan requirements in a proposal

Proposed Kernza project evaluation plan

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“Evaluation Plan with Stakeholders and External Evaluators: We have engaged the services of the University of Wisconsin Madison Natural Resources Institute (NRI) Evaluation Service Unit. The project lead is Samuel Pratsch, Evaluation Specialist and Unit Coordinator. The experienced Evaluation Unit is well equipped to perform evaluation of large federal projects, and **has been engaged in a preparatory way in guiding our project network design and logic model** so as to provide an effective baseline to evaluate against. The NRI Evaluation Unit has **prepared a draft Scope of Work** bookended by development of the evaluation plan (Year 1) and a full end of project report (Year 5), **with significant process and impact evaluation techniques planned throughout the project to track chosen indicators of the project’s success (social network analysis, key informant interviews, team functioning, educational curricula surveys)**. Integration and project management team members will liaise directly with the evaluators for smooth flow of data collection and communications, and the project advisory board will provide feedback and direction on objective group outcomes and mid-project course correction suggestions as informed by process evaluation recommendations. Prior to project launch, **the integration team will convene evaluators and advisory committee members to finalize an evaluation plan that ensures that activities are successful in achieving project goals** and in contributing to the achievement of the stated program goals and outcomes.”

What is strong in this plan?

- Specific data collection methods identified
- Stakeholder engagement is mentioned and integrated
- Responsibilities and skills are specified
- Some flexibility built in, acknowledges conditions may change by the time proposal is funded

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What could be stronger in this plan?

- Not clear how evaluation activities were related
- Lack of clearly described indicators
- Communication strategy isn't detailed
- Over-promised what could be accomplished with the hours designated in the Scope of Work

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Implementation using principles for project evaluation and communication

- Brainstorming activity about key values with project leadership team
- Survey for partners and advisory board input
- Evaluation team drafted final statements



Kernza®CAP

Shared Values and Principles

These five core principles and descriptive operating principles summarize attributes that the Kernza CAP team specifically wants to bring to the broader Kernza network. The network already strives to be systems- and farmer-focused, focused on long-term sustainability and prosperity across regions, with a culture of co-creation, curiosity, care, and humility. The coordinating team, collaborators, and advisory committee all had input on these principles.

1. **Support a long-term, transformative vision of agriculture** that is shared and just.
 - a. Foster inspiration, hope, and creativity in conversations about future agroecological systems in a changing climate.
 - b. Document and model creative strategies for other transdisciplinary research, extension, and education initiatives.
 - c. Facilitate coordination and build capacity across agricultural sectors to support ongoing efforts beyond the project timeline.
2. **Scale Kernza research and activities responsibly** to fit a wide range of contexts and needs.
 - a. Increase dialogue about access to land, capital, opportunities, and education for Kernza.
 - b. Consider implementation across systems big and small, urban and rural, and a range of farm and business models. Collaborate with farmers to understand how Kernza can be implemented sustainably and profitably across contexts.
 - c. Incorporate diverse management practices and financial valuation strategies in research, drawing from local and global efforts.
3. **Promote an open team culture** that is supportive, creative, and learning-focused.
 - a. Encourage innovative ideas and scientific rigor, while naming and addressing mistakes, tensions, and difficult choices as they arise.
 - b. Acknowledge and celebrate accomplishments.
 - c. Support rest, focus, and care.
4. **Prioritize racial and gender equity** throughout project research, activities, and processes.
 - a. Empower learning and development amongst Kernza CAP project collaborators.
 - b. Build mutually beneficial, long-term relationships beyond the current white-dominant networks.
 - c. Leverage project resources, processes and decisions we have at hand to promote racial and gender equity.
 - d. Reflect and report openly on our process and results.
5. **Build shared leadership and agency into collaborations** that are mutually beneficial.
 - a. Seek out and value nonacademic knowledge, perspectives, and cultural expertise.
 - b. Engage in deep listening with partners and hold one another accountable in allyship.
 - c. Cultivate transparency, honesty, and accessibility in communication.

Brainstorm of project values and final Kernza®CAP Shared Values and Principles
 Photo credits: Kernza®CAP project (award no. 2019-08284)

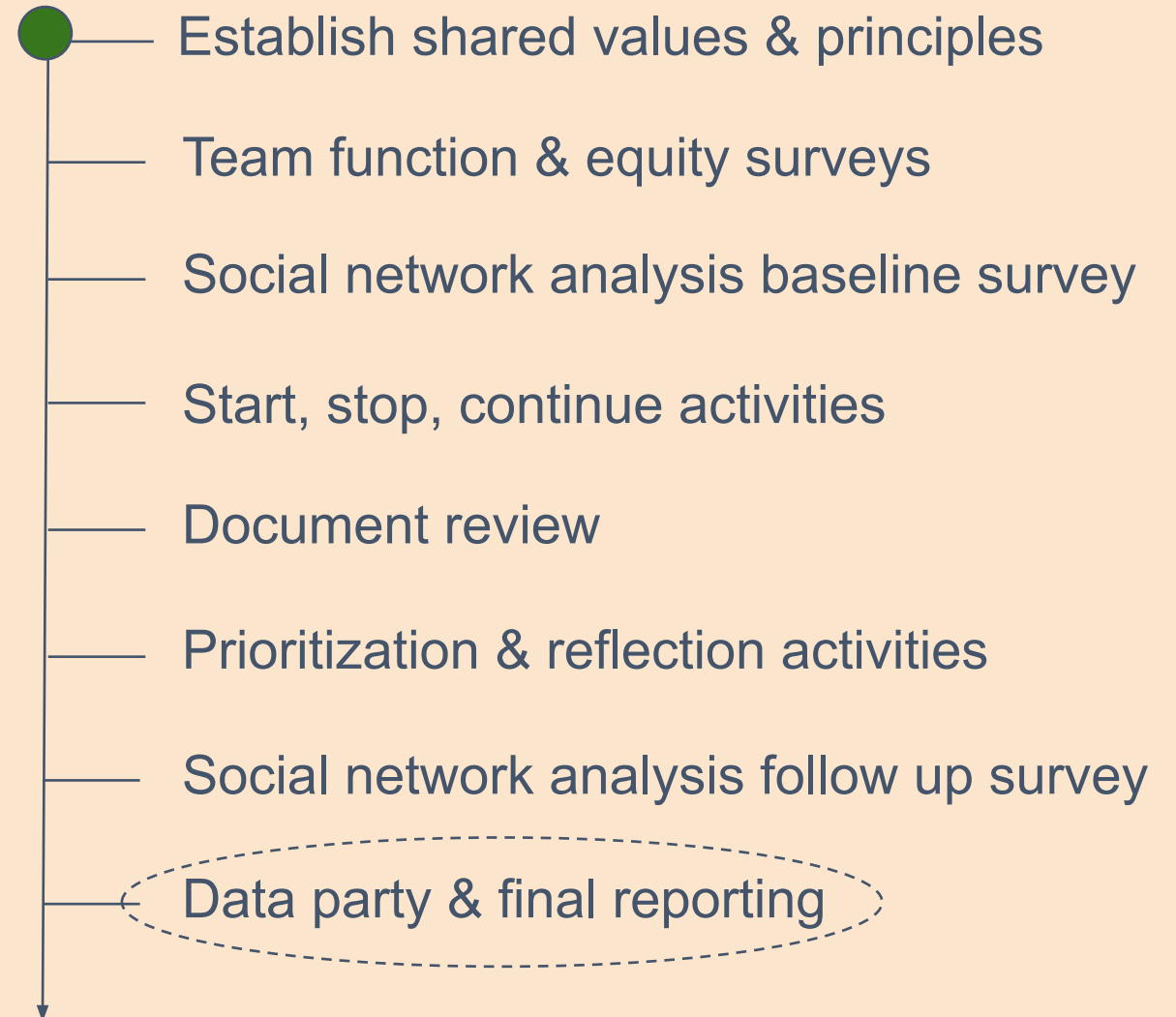
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Evaluation activities to address Kernza values & principles:



Currently in the process of final project wrap-up before no-cost extension year

Final outputs for final reporting:

- Social network analysis slide decks and reports (2022 & 2025)
- Summaries from evaluation activities
 - Team function surveys
 - Reflection activities
 - Start, stop, continue
 - Prioritization activities
 - Document review
- Social network analysis datasets
- Handouts and facilitator guides from project activities

Sample evaluation project outputs

Photo credits: *Kernza®CAP project* (award no. 2019-08284)

Social Network Analysis: What have we learned about relationships, activities, and information flow across the Kernza® CAP network?

High level takeaways from network analysis

- Demographic and organizational makeup of people who responded to the survey was similar from 2022 - 2025
 - Majority researchers, farmers, nonprofit staff responded
- Some geographic diffusion and more survey respondents outside Minnesota in 2025
- 65% of network connections in 2025 were between people in different types of organizations
- Increase in processors and wholesale distributors who responded or were referenced in the network, as well as teachers or K-12 educators
- Important sources of information about Kernza are shifting! Word of mouth is still top of the list for CAP collaborators, but print publications, extension briefs, and video or webinar resources are increasing in importance for other groups!

Goals of the Kernza® CAP network analysis (2022 - 2025):

- Identify characteristics of those in Kernza® activities related to the CAP and learn more about how the network exchanges information.

2022 network survey:

- Sent to 281 contacts by email (CAP contact lists & Kernza licensees) with a focus on U.S. contacts
- 160 responses, 56.9% response rate
- Network sample:
 - 213 connected people
 - 41 unconnected

2025 network survey:

- Sent to 428 contacts (CAP contact lists & Kernza licensees) with a focus on U.S. contacts
- 176 responses, 41.4% response rate
- Network sample:
 - 276 connected people
 - 34 unconnected

2025 network data above illustrates connections between survey respondents and up to 5 of their most important contacts. Graphed in open source software Gephi 0.10.10 using a Fruchterman-Reingold algorithm to cluster source connected nodes at the center of the network and the less connected or disconnected individuals around the periphery. Full report coming soon!

Questions? Contact Greta at greta.landis@wisc.edu

2022 survey responses by state:

- 49% in Minnesota
- 10% in Kansas
- 10% Wisconsin

2025 survey responses by state:

- 38% in Minnesota
- 17% in Kansas
- 12% Wisconsin

Where would you like to see Kernza go next? In a sentence or two, what do you hope to see happen next in Kernza production, processing, research, policy, education, use, or other areas? High-level themes from 151 responses, in order of frequency.

- Prioritizing market development and profitability**, including incorporating the "perennial percentage" into more food products and nutrient-dense foods, working toward multi-year contracts and opportunities...
- Expanding Kernza acreage and integration** into additional cropping systems and rotations, working toward focus on dual use options.
- Breeding programs and building access to seed and grain**, with focus on regional adaptation and food quality grain.
- Education and marketing**, including both increasing consumer demand and providing technical support for growers to manage weed pressure, fertilizer, harvest, and post-harvest storage.
- Building processing infrastructure** for grain cleaning and post harvest processing.
- Advocating for policies** that support Kernza, including using Kernza as a bridge to other perennial or agroforestry systems.

CAP collaborator feedback

Collaborators shared reflections in the 2025 survey:

What was your experience with collaboration? What worked and what didn't? High level themes in 48 responses:

- What worked?** The supportive team environment and atmosphere, effective communication and updates, virtual attendance options, valuing of collaborative spirit.
- What didn't?** Some challenges with role clarity and engagement, long decision-making processes, and disciplinary silos still arose at times.

Most significant changes or accomplishments resulting from Kernza CAP? High level themes in 58 responses:

- Increased awareness of Kernza as a crop**, moving products and real world applications.
- Building and strengthening relationships** in the Kernza community, and setting a collaborative tone for future work.
- Advancing multi-sector research and data availability** across geographic regions to communicate about growing practices, processing, genetics and plant breeding, and market access across different sectors and disciplines.
- Policy and funding influence** related to perennial grains.
- Development of new educational resources** and curricula.

What types of organizations are represented by people in 2025?

Color coded by organization

- College or university (37.1%)
- Farm (17.9%)
- Nonprofit (17.8%)
- State, Federal, or Tribal government (6.6%)
- Retail, food, or beverage industry (4.5%)
- Local, municipal, or county government (1.5%)
- Other private firm or consultancy (1.2%)
- Processor, handler, or wholesale distributor (5.4%)
- Other (2.5%)
- School or education center (5.4%)

* percentages add up to more than 100% due to rounding

Network graphed in Gephi 0.10.1 with a Fruchterman-Reingold layout

Lessons-learned from evaluation proposal-writing process:

- Relationship- and partnership-focused **evaluation activities were well-aligned team culture** and goals
- **Flexibility in proposal was a strength** and let us adapt to emerging team needs...
... but also meant we over-promised a bit (social network analysis was more time-intensive than anticipated)
- We could have been clearer on what our outputs would look like and how our activities were connected at the outset to help guide decision-making about scope of work

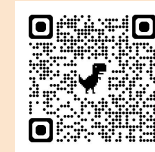
Reach out to our team if you have questions about these processes or activities—happy to share as we finish our final reports!

KernzaCAP evaluation team:

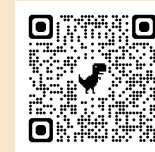
greta.landis@wisc.edu

amber.mase@wisc.edu

samuel.pratsch@wisc.edu



More information about our team and evaluation services [here](#)



More information about the Kernza project [here](#)

Questions & Activity

Discussion - we want to hear from you!

- Which of these suggestions for writing strong evaluation plans do you already do well? Which do you want to improve or further build in your work?
- What other strategies and characteristics do you consider important for writing strong evaluation plans?

Move to [Zoom whiteboard](https://zoom.us/jb/9876543210)

<https://zoom.us/wb/doc/XBvZVZCVToqkDgeDGIQFQg>

References and Resources

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Resources

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What Makes a Strong Evaluation Plan in a Grant Proposal?

Vikram Koundinya

Samuel Ikendi

Nav Ghimire

Greta Landis

Rama Radhakrishna

See next page for additional authors

Think Tank

Track: Extension Education Evaluation

Best Practices for Writing Strong Evaluation Plans for Grant Proposals

Vikram Koundinya, PhD – University of California-Davis

Vikram Koundinya, PhD – University of California-Davis

Samuel Ikendi, PhD (he/him/his) – University of California, Merced

Nav Ghimire, PhD (he/him/his) – Associate Dean, University of Nebraska-Lincoln

Greta Landis

Rama Radhakrishna

Vikram Koundinya, PhD – University of California-Davis

Thank You!

Contact Information of Presenters

vkoundinya@ucdavis.edu

sikendi@ucanr.edu

greta.landis@wisc.edu