**FX09 Evaluation Guidance Note**

## Introduction

This tool provides some tips and key steps to ensure evaluation is built into the exercise, from the design phase to the reporting phase.Some important definitions include:

**Evaluation criteria:** The objectives describe the expected outcome from operations or functions. Objectives are central for evaluating the exercise. Objectives must be clear, concise and precise.

The evaluation methodology for functions being tested is achieved by comparing operations or functions observed during the exercise with the expected actions from plans and SOPs.

**Evaluation material**: The evaluation matrix presents the expected actions that the participants should carry out in order to achieve the exercise objectives. These actions are based on plans, guidelines and SOPs.

**Evaluators:** these are usually technical experts. Depending on the operation of functions being tested, they may be experts in fields including but not limited to surveillance, rapid response capacity, case management, infection control, disinfection and waste management, risk communication, laboratory work and coordination. Evaluators may come from the host country, WHO, or other relevant agencies.

## Scope of the evaluation

The evaluation of a FX addresses two aspects:

* Evaluation of participants’ performance in exercising the operation(s) and/or function(s) tested
* Evaluation of the FX organisation.

Evaluation is a key part of the pre-exercise planning phase, and is necessary to ensure that the evaluation material and expected outputs will achieve the exercise objectives.

1. **During the exercise design phase**
* Compile all plans, SOPs and other reference materials existing within the response system
* Assemble an evaluators’ team. Nominate a lead evaluator and ensure that all the required technical expertise is represented within the team. Ensure balanced representation by choosing members from different organizations/departments when possible.
* Define expected actions for each task and operation and/or function.
* Complete the Inject matrix by describing each of the expected actions. Provide indicators for success for each of them (i.e. specific decision made, correct use of specific SOPs, process initiated, etc.).
* Prepare additional evaluators’ assessment sheets if it is felt that specific injects will require more than actions and indicators in the inject matrix.
* With the management team, develop a methodology for the drill debriefing.
* Develop the slides, support materials and templates needed to run the debriefing sessions.
* Prepare the feedback form. *(****TIP****: See template for* Participant feedback form*).*
* Prepare materials for the evaluators’ briefing prior to the drill.
* Invite all evaluators to the pre-exercise briefing and confirm availability.
1. **Evaluators’ briefing**
* Provide evaluators with clear directives on their expected roles and behaviours during the simulation.
* Allocate specific roles and responsibilities within the evaluation team during the exercise as well as during the debriefing sessions.
* Explain how evaluators are expected to compile and submit their observations.
* Confirm deadline for submission of their inputs.
1. **During the exercise**
* Conduct quick meetings between the evaluation team and the facilitation team in between the sessions of the exercise in order to share any particular concerns regarding the conduct of the exercise.
* ***TIP:*** *the lead evaluator should circulate among the evaluators and ensure that all of them are able to perform their roles properly. Any urgent issues should be communicated directly to the control team.*
1. **After the exercise**
* Conduct an evaluators’ meeting before the participants’ debriefings.
* After the participants’ debriefing, the lead evaluator should facilitate an additional debriefing with all the exercise management team to collect feedback on the conduct of the exercise and lessons for future exercises.
* Provide all input necessary for drafting the report.