


Evaluation Basics

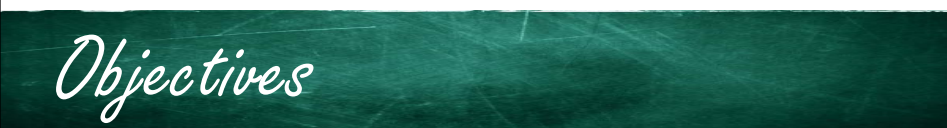
Evaluat|e
EVALUATION RESOURCE CENTER *for*
advanced technological education

November 18, 2009



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Objectives

1. Raise your awareness about evaluation
2. Help you be an informed evaluation consumer
3. Show you where you can go for help with your questions about evaluation
4. Inspire you to join us in our efforts to develop an ATE evaluation community of practice

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www.evaluate.org

Evaluate
EVALUATION RESOURCE CENTER
Advanced Technological Education

Evaluate promotes the goals of the Advanced Technological Education program by partnering with ATE projects and centers to strengthen the program's evaluation knowledge base, expand the use of exemplary evaluation practices, and support the continuous improvement of technosocial education throughout the nation.

About Us | Annual Survey | Resources | Forum | Events | HELP

VISIT OUR RESOURCE LIBRARY
Evaluate's resource library contains materials related to evaluation theory, methodology, practice, and use. We have selected materials that are especially pertinent to the evaluation of ATE projects and centers. We invite you to help us expand the library by recommending or submitting evaluation resources you have found useful in your evaluation work.

Connect to our Community

View our Annual Survey Results

Upcoming Events
October 20, 2009 | 9AM-4:30PM
Student Assessment Workshop
October 21-23, 2009
ATE PI Annual Conference
November 9-14, 2009
American Evaluation Association Annual Conference
February 4 & 5, 2010 | 8:30 am - 4 pm (3 pm on Day 2)
Workshop: Professional Development Impact

How do I design an evaluation?

Recent Additions

- Registration is now open for our October Student Assessment workshop with Gloria Rogers
- 2009 ATE Survey Fact Sheet
- Case Examples of Project Evaluations
- Summer Issue of *Conduit*

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Agenda

1. Introductions
2. Webinar Procedures
3. Our History
- 4. Finding/Selecting an Evaluator**
- 5. Use of Evaluation Resources**
6. Starting on the Right Foot
- 7. ATE Evaluation Community of Practice**
- 8. Webinar Evaluation**

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Introductions

<p>Arlen Gullickson</p>  <p>Presenter</p>	<p>Peggie Weeks</p>  <p>Presenter</p>	<p>Lori Wingate</p>  <p>Presenter</p>	<p>Stephanie Evergreen</p>  <p>Moderator</p>	<p>Mark Viquesney</p>  <p>Host & Technical Coordinator</p>
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WESTERN MICHIGAN
UNIVERSITY




**MARICOPA
COMMUNITY
COLLEGES**




Finding an Evaluator

- Evaluator directories
- University research centers
- University/college faculty
- Graduate programs
- ATE centers

Get evaluators to seek YOU
out by issuing an RFP for evaluation



Requesting Evaluation Proposals



- Evaluation team's qualifications
- Statement of work
- Cost
- References

Evaluation proposal components:

The information you want from proposers

Be sure to check with your Grants/Contracts office when considering issuing an RFP

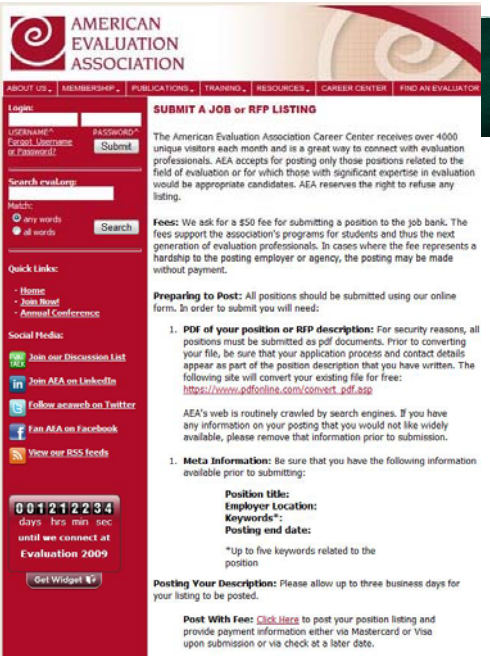
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Request for Proposals

To post an RFP for your ATE evaluation:

www.eval.org > Career Center

\$50 per post (or free if cost-prohibitive)



AMERICAN EVALUATION ASSOCIATION

ABOUT US | MEMBERSHIP | PUBLICATIONS | TRAINING | RESOURCES | CAREER CENTER | FIND AN EVALUATOR

Log in: Username/Email, License, or Password: Password: Submit

Search eval.org: Search

Match: any words, all words Search

Quick Links: Home, Join Now, Annual Conference

Social Media: Join our Discussion List, Join AEA on LinkedIn, Follow us on Twitter, Fan AEA on Facebook, View our RSS feeds

00121234 days hrs min sec until we connect at Evaluation 2009 Get Widget

SUBMIT A JOB or RFP LISTING

The American Evaluation Association Career Center receives over 4000 unique visitors each month and is a great way to connect with evaluation professionals. AEA accepts for posting only those positions related to the field of evaluation or for which those with significant expertise in evaluation would be appropriate candidates. AEA reserves the right to refuse any listing.

Fees: We ask for a \$50 fee for submitting a position to the job bank. The fees support the association's programs for students and thus the next generation of evaluation professionals. In cases where the fee represents a hardship to the posting employer or agency, the posting may be made without payment.

Preparing to Post: All positions should be submitted using our online form. In order to submit you will need:

- PDF of your position or RFP description:** For security reasons, all positions must be submitted as pdf documents. Prior to converting your file, be sure that your application process and contact details appear as part of the position description that you have written. The following site will convert your existing file for free: http://www.pdfonline.com/convert_pdf.asp

AEA's web is routinely crawled by search engines. If you have any information on your posting that you would not like widely available, please remove that information prior to submission.

- Meta Information:** Be sure that you have the following information available prior to submitting:
 - Position title:
 - Employer Location:
 - Keywords*:
 - Posting end date:

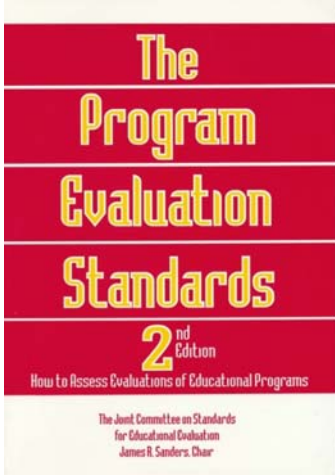
*Up to five keywords related to the position

Posting Your Description: Please allow up to three business days for your listing to be posted.

Post With Fee: [Click Here](#) to post your position listing and provide payment information either via Mastercard or Visa upon submission or via check at a later date.

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Be an Informed Consumer




30 standards for ensuring the

- Utility
- Feasibility
- Propriety &
- Accuracy

of educational program evaluations

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Be an Informed Consumer




AMERICAN EVALUATION ASSOCIATION
Guiding Principles for Evaluators

- Systematic Inquiry
- Competence
- Integrity/Honesty
- Respect for People
- Responsibilities for the General & Public Welfare


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Be an Informed Consumer

Utility Standard on Evaluator Credibility:
The persons conducting the evaluation should be both trustworthy and competent ...



Competence Principle:
Evaluators provide competent performance to stakeholders.



Evaluator Credibility & Competency

- Knowledge of evaluation
- Knowledge of ATE
- Knowledge of discipline
- Evaluation skill
- Evaluation experience

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Money

Why spend money on evaluation?

- Demonstrate accountability
- Find ways to enhance your project

How much to allocate?


- 7-10% of your project budget




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People

Evaluation consultant
 Project personnel
 Advisory panels



Time=Money



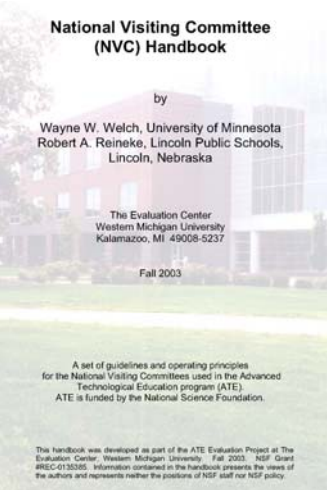
- Use free online tools, e.g.,
 - Google (Docs, Calendar, Groups)
 - Whenisgood.com
 - Skype.com
 - Surveymonkey.com
- Utilize work study students
- Make use of institutional data
- Routinize data collection into project activities
- Adopt evaluation materials from other projects

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Role of Advisory Boards

- Advise
- Evaluate
- Advocate

resources.evaluate.org
keyword search: NVC



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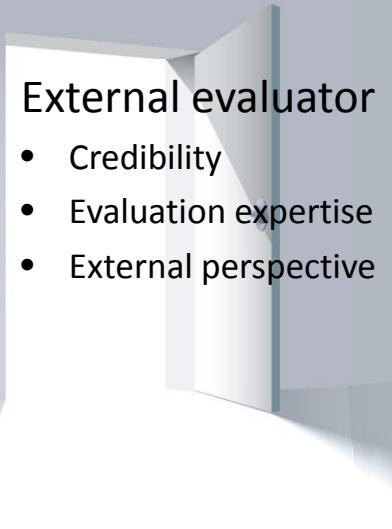
Role of Advisory Boards

- Has the project implemented the activities described in the proposal?
- Is there evidence that those involved in the project have found the activities worthwhile? Have these people found the activities useful?
- Is there evidence that indicates that the goals of the project have been achieved?

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Internal & External Evaluation

<h3>Internal evaluator</h3> <ul style="list-style-type: none">• Access to data and informants• Internal perspective: Familiarity with project context and purpose	<h3>External evaluator</h3> <ul style="list-style-type: none">• Credibility• Evaluation expertise• External perspective
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Controlling Internal Bias

- Establish policies and procedures to ensure integrity of data
- Train data collectors
- Document how information was collected and from whom

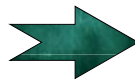


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Before you Begin...

How do you think about evaluation?

“a necessary evil”
or
“an obligation
imposed by NSF”



“a valuable
process”

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Work Expectations

Clearly defined
Specific
Effectively communicated
Mutually agreed upon
Client and evaluator BOTH have responsibilities

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Formal Agreements

- Clarify expectations
- Prevent misunderstandings
- Explicit, but allow for adjustments



A photograph showing a person's hand in a grey suit jacket holding a silver pen over a document. The document is partially visible and has the number '21' in the bottom right corner.

Formal Agreements



- What is to be done
- How
- By whom
- When
- Payment

Consider supplementing institutional boilerplate contract with a detailed Memorandum of Agreement

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Contracts Checklist

Basic Considerations
What is the purpose of the evaluation?

Information
How will data be collected? From what sources?

Client responsibilities
How will the client facilitate access to information?

evalu-ate.org/find-an-evaluator/

EVALUATION CONTRACTS CHECKLIST
Daniel L. Stufflebeam, 1999

This checklist designed to help evaluators and clients to identify key contractual issues and make and record their agreements for conducting an evaluation. Advance agreements on these matters can mean the difference between an evaluation's success and failure. Without such agreements the evaluation process is constantly subject to misunderstanding, disputes, efforts to compromise the findings, attack and/or withdrawal—by the client—of cooperation and funds.

Mark each item as important and incorporated or not applicable or leave it blank indicating not agreed to though important.

<p>Basic Considerations</p> <p><input type="checkbox"/> Object of the evaluation</p> <p><input type="checkbox"/> Purpose of the evaluation</p> <p><input type="checkbox"/> Client</p> <p><input type="checkbox"/> Other right-to-know audiences (Authorized evaluator(s))</p> <p><input type="checkbox"/> Guiding values and criteria</p> <p><input type="checkbox"/> Standards for judging the evaluation</p> <p><input type="checkbox"/> Contractual questions</p> <p>Information</p> <p><input type="checkbox"/> Required information</p> <p><input type="checkbox"/> Data collection procedures</p> <p><input type="checkbox"/> Data collection instruments and protocols</p> <p><input type="checkbox"/> Information sources</p> <p><input type="checkbox"/> Participant selection</p> <p><input type="checkbox"/> Provisions to obtain needed permissions to collect data</p> <p><input type="checkbox"/> Follow-up procedures to assure adequate information</p> <p><input type="checkbox"/> Provisions for assuring the quality of obtained information</p> <p><input type="checkbox"/> Provisions to store and maintain security of collected information</p> <p>Analysis</p> <p><input type="checkbox"/> Procedures for analyzing quantitative information</p> <p><input type="checkbox"/> Procedures for analyzing qualitative information</p> <p>Reports</p> <p><input type="checkbox"/> Deliverables and due dates</p> <p><input type="checkbox"/> Interim report formats, contents, lengths, audiences, and methods of delivery</p> <p><input type="checkbox"/> Final report format, contents, length, audiences, and methods of delivery</p> <p><input type="checkbox"/> Restrictions/permissions to report via diskettes, web site, etc.</p> <p><input type="checkbox"/> Restrictions/permissions to publish information from or based on the evaluation</p>	<p>Reporting Safeguards</p> <p><input type="checkbox"/> Anonymity/confidentiality</p> <p><input type="checkbox"/> Prerelease review of reports</p> <p><input type="checkbox"/> Results by evaluators</p> <p><input type="checkbox"/> Editorial authority</p> <p><input type="checkbox"/> Final authority to release reports</p> <p>Protocol</p> <p><input type="checkbox"/> Contact persons</p> <p><input type="checkbox"/> Rules for contacting program personnel</p> <p><input type="checkbox"/> Communication channels and assistance</p> <p>Evaluation Management</p> <p><input type="checkbox"/> Time line for evaluation work of both clients and evaluators</p> <p><input type="checkbox"/> Assignment of evaluation responsibilities</p> <p>Client Responsibilities</p> <p><input type="checkbox"/> Access to information</p> <p><input type="checkbox"/> Services</p> <p><input type="checkbox"/> Personnel</p> <p><input type="checkbox"/> Information</p> <p><input type="checkbox"/> Facilities</p> <p><input type="checkbox"/> Equipment</p> <p><input type="checkbox"/> Materials</p> <p><input type="checkbox"/> Transportation assistance</p> <p><input type="checkbox"/> Work space</p> <p>Evaluation Budget</p> <p><input type="checkbox"/> Payment amounts and dates</p> <p><input type="checkbox"/> Conditions for payment, including delivery of required reports</p> <p><input type="checkbox"/> Budget limits/restrictions</p> <p><input type="checkbox"/> Agreed-upon indirect/overhead rates</p> <p><input type="checkbox"/> Contracts for budgetary matters</p> <p>Review and Control of the Evaluation</p> <p><input type="checkbox"/> Contract amendment and cancellation provisions</p> <p><input type="checkbox"/> Provisions for periodic review, modification, and renegotiation of the evaluation design as needed</p> <p><input type="checkbox"/> Provision for evaluating the evaluation against professional standards of sound evaluation</p>
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Preparer: _____ Date: _____

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Your Evaluator



- An integral part of your project team
- Understands your project
- Designs/adapts the evaluation plan to meet project needs

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Other Considerations

- Be clear!
- Meet to iron out the details
- Work out a schedule
- Think about data collection
- Ensure objectivity
- Make no assumptions!



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Communication

- Critical!
- Establish a plan:
How often?
Who will initiate?
Teleconference vs.
Face-to-face?



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Reporting Responsibility



Client first
NSF summary
Other stakeholders

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Featured Resources

[www.evaluate-ate.org/
find-an-evaluator/](http://www.evaluate-ate.org/find-an-evaluator/)

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HOW DO I FIND AN EVALUATOR?

One of the questions we are asked most frequently is, "How do I find an evaluator?" Below are some resources to get your started.

To locate an evaluator, check out these national directories:
[American Evaluation Association's Evaluator Directory](#)
[The Evaluation Centers' Directory of Evaluators](#)

To post an evaluation job or request for proposals:
[American Evaluation Association Career Center](#)

For guidance on negotiating agreements and contracts with evaluators:
[Evaluation Contracts Checklist](#) (Daniel Stufflebeam)
[Checklist for Negotiating Agreements to Evaluate an Educational Programme](#) (Robert Stake)
[General Tips for Hiring an Evaluator](#) (Kellogg Foundation)

For information about what evaluators should know and be able to do:
[Essential Competencies for Program Evaluators](#) (American Evaluation Association)
[Evaluator Competencies](#) (International Board for Standards for Training, Performance and Instruction)
[Competencies for Canadian Evaluation Practice](#) (Canadian Evaluation Society)
[Self-Assessment of Program Evaluation Expertise](#) (Daniel Stufflebeam)

Archive

Visit *resources.evaluate.org*
Keyword search:
evaluation basics

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Thank You!

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