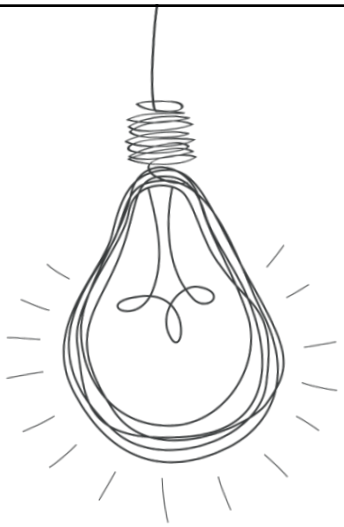

GETTING STARTED WITH YOUR ATE EVALUATION

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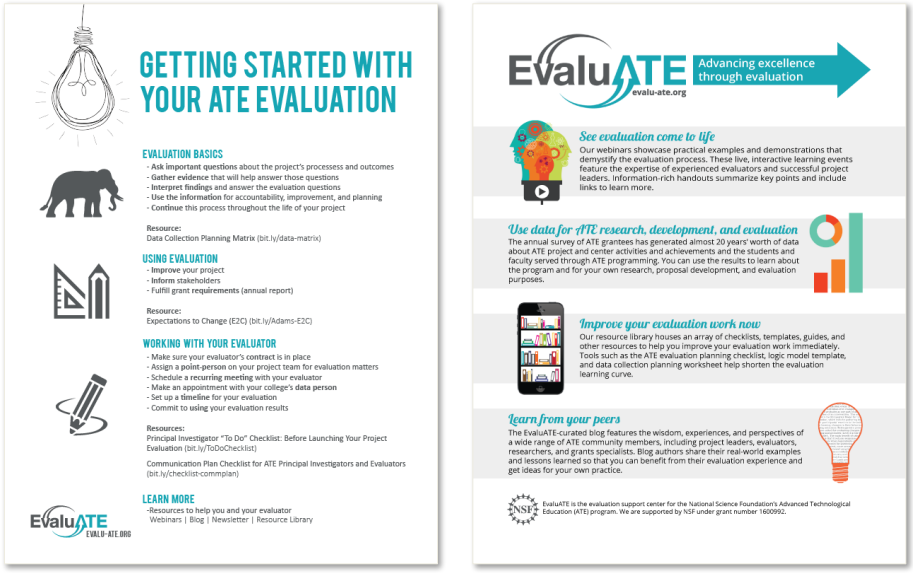
NSF

Western Michigan University
The Evaluation Center



GETTING STARTED WITH YOUR ATE EVALUATION

EVALUATION BASICS
- Ask important questions about the project's processes and outcomes
- Gather evidence that will help answer those questions
- Interpret findings and answer the evaluation questions
- Use the information for accountability, improvement, and planning
- Continue this process throughout the life of your project

Resource:
Data Collection Planning Matrix (bit.ly/data-matrix)

USING EVALUATION
- Improve your project
- Inform stakeholders
- Fulfill grant requirements (annual report)

Resource:
Expectations to Change (E2C) (bit.ly/Adams-E2C)

WORKING WITH YOUR EVALUATOR
- Make sure your evaluator's contract is in place
- Assign a point-person on your project team for evaluation matters
- Schedule a recurring meeting with your evaluator
- Make an appointment with your college's data person
- Set up a timeline for your evaluation
- Commit to using your evaluation results

Resources:
Principal Investigator "To Do" Checklist: Before Launching Your Project Evaluation (bit.ly/ToDoChecklist)

Communication Plan Checklist for ATE Principal Investigators and Evaluators (bit.ly/checklist-commplan)

LEARN MORE
-Resources to help you and your evaluator
Webinars | Blog | Newsletter | Resource Library

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EvaluATE
Advancing excellence through evaluation
evalu-ate.org

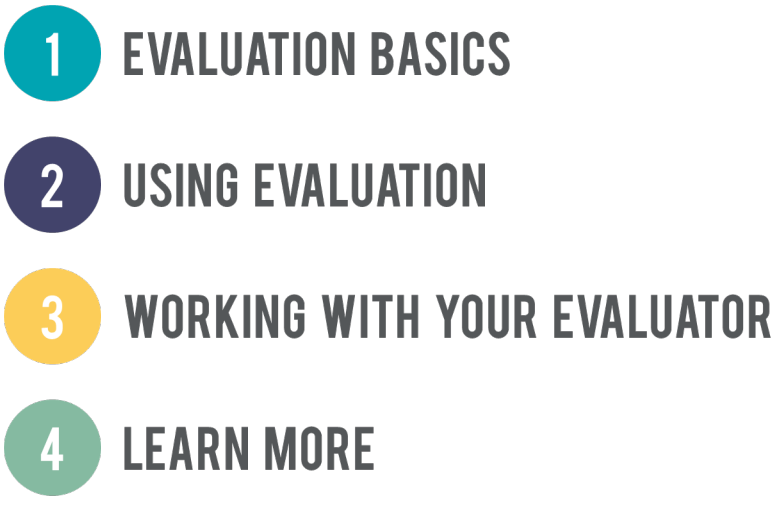
See evaluation come to life
Our webinars showcase practical examples and demonstrations that demystify the evaluation process. These live, interactive learning events feature the expertise of experienced evaluators and successful project leaders. Information-rich handouts summarize key points and include links to learn more.

Use data for ATE research, development, and evaluation
The annual survey of ATE grantees has generated almost 20 years' worth of data about ATE project and center activities and achievements and the students and faculty served through ATE programming. You can use the results to learn about the program and for your own research, proposal development, and evaluation purposes.

Improve your evaluation work now
Our resource library houses an array of checklists, templates, guides, and other resources to help you improve your evaluation work immediately. Tools such as the ATE evaluation planning checklist, logic model template, and data collection planning worksheet help shorten the evaluation learning curve.

Learn from your peers
The EvaluATE-curated blog features the wisdom, experiences, and perspectives of a wide range of ATE community members, including project leaders, evaluators, researchers, and grants specialists. Blog authors share their real-world examples and lessons learned so that you can benefit from their evaluation experience and get ideas for your own practice.

EvaluATE is the evaluation support center for the National Science Foundation's Advanced Technological Education (ATE) program. We are supported by NSF under grant number 1600992.



1 EVALUATION BASICS

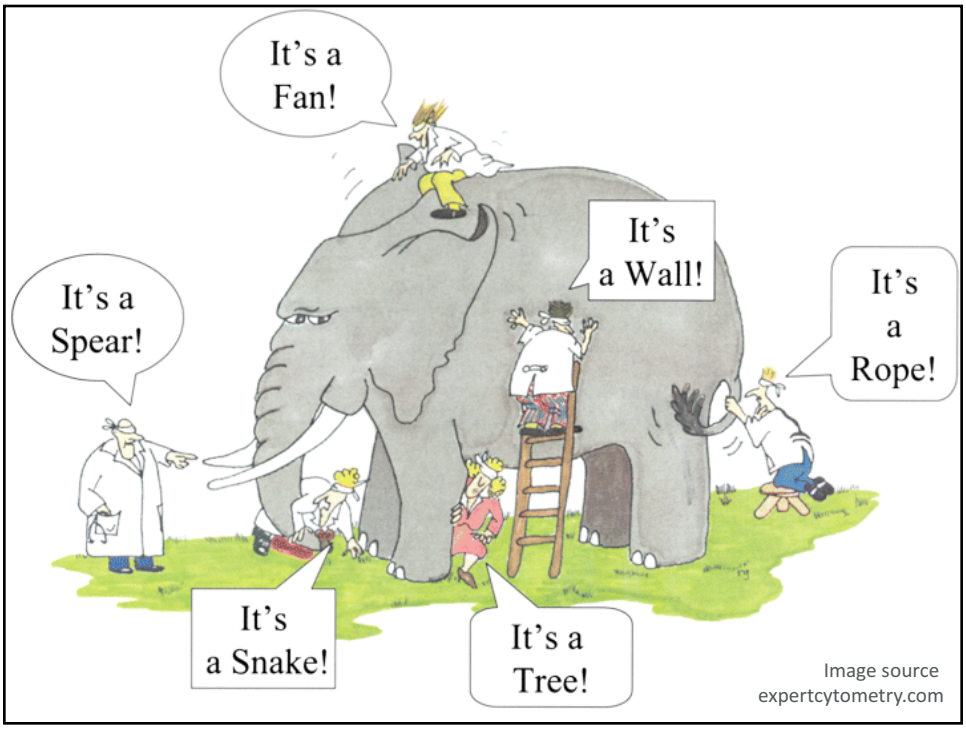
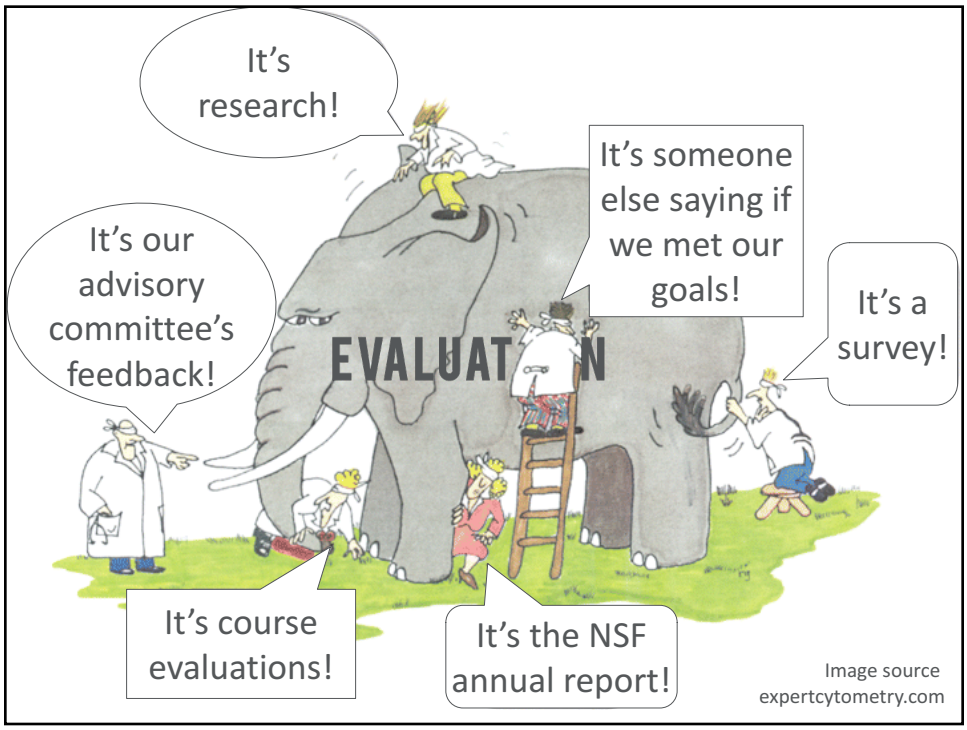
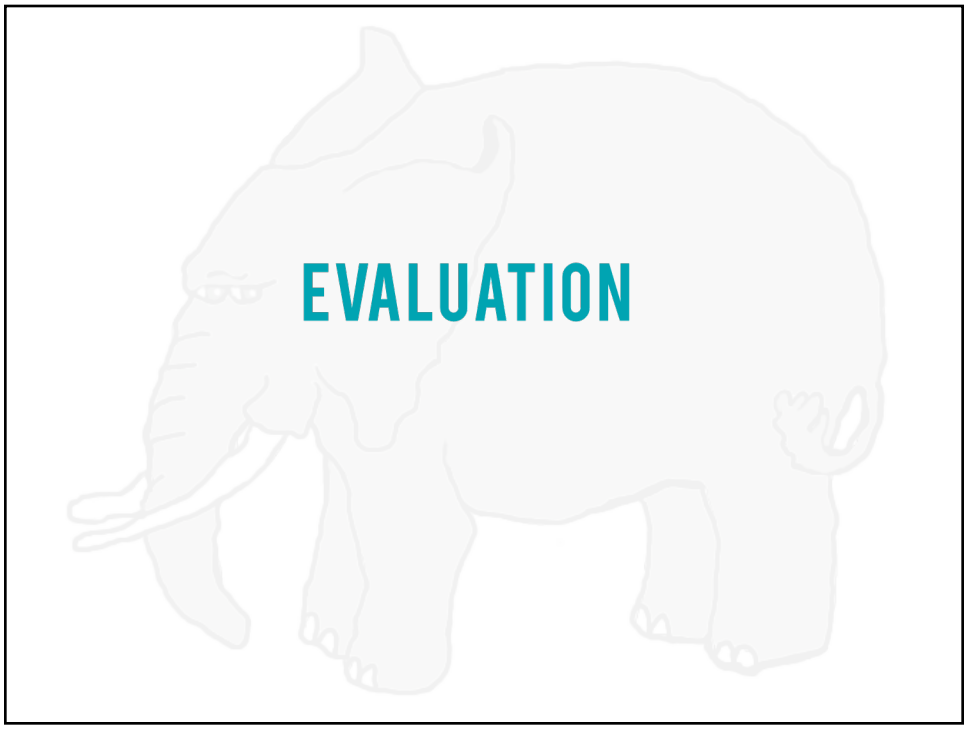


Image source expertcytometry.com


It's research!
It's someone else saying if we met our goals!
It's our advisory committee's feedback!
EVALUAT N
It's a survey!
It's course evaluations!
It's the NSF annual report!
Image source expertcytometry.com


EVALUATION

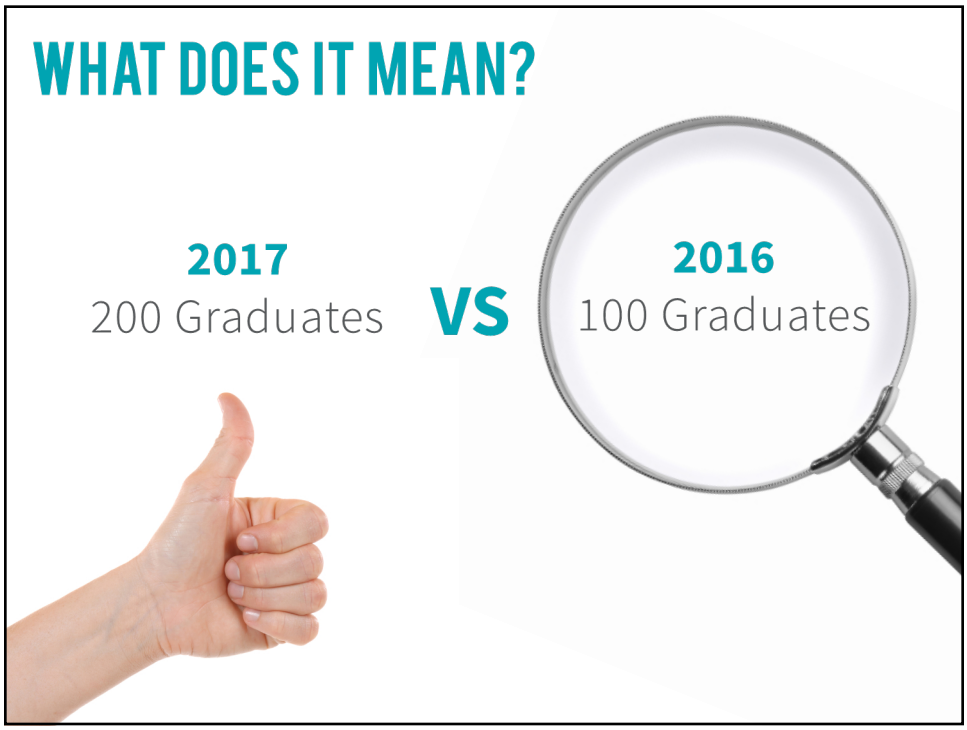
EVALUATION

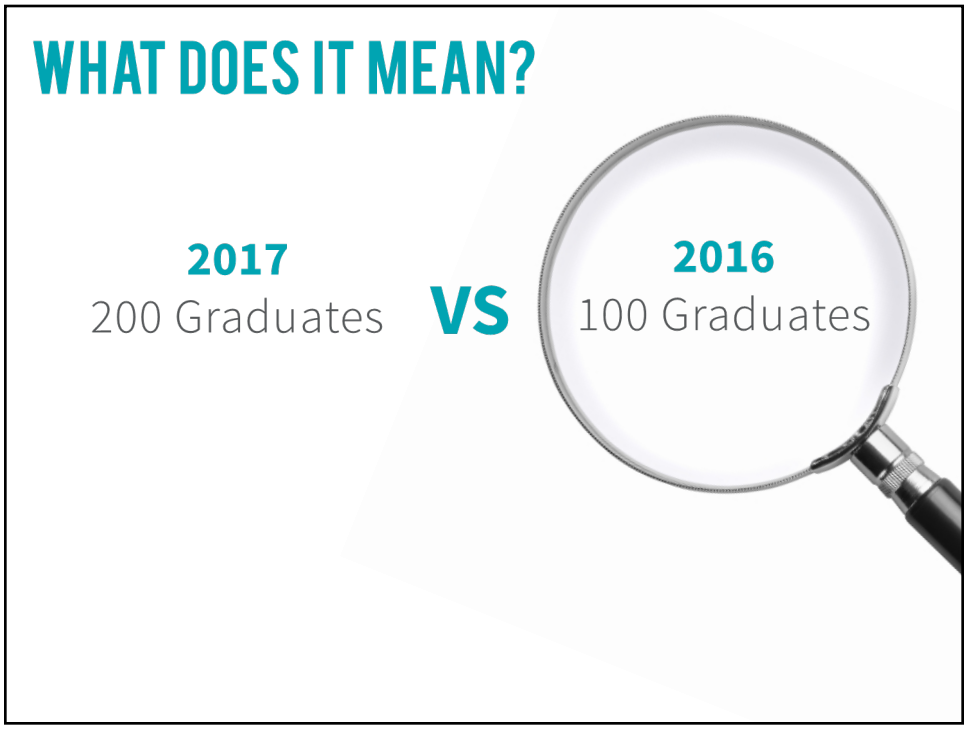
A systematic determination of a project's quality and effectiveness.

WHAT DOES IT MEAN?

2017

200 Graduates


WHAT DOES IT MEAN?
2017
200 Graduates
VS
2016
100 Graduates


WHAT DOES IT MEAN?
2017
200 Graduates
VS
2016
100 Graduates

1. ASK IMPORTANT QUESTIONS about a project's processes and outcomes.
4 BASIC STEPS FOR CONDUCTING EVALUATION

1. ASK IMPORTANT QUESTIONS about a project's processes and outcomes.
2. GATHER EVIDENCE that will help answer those questions.
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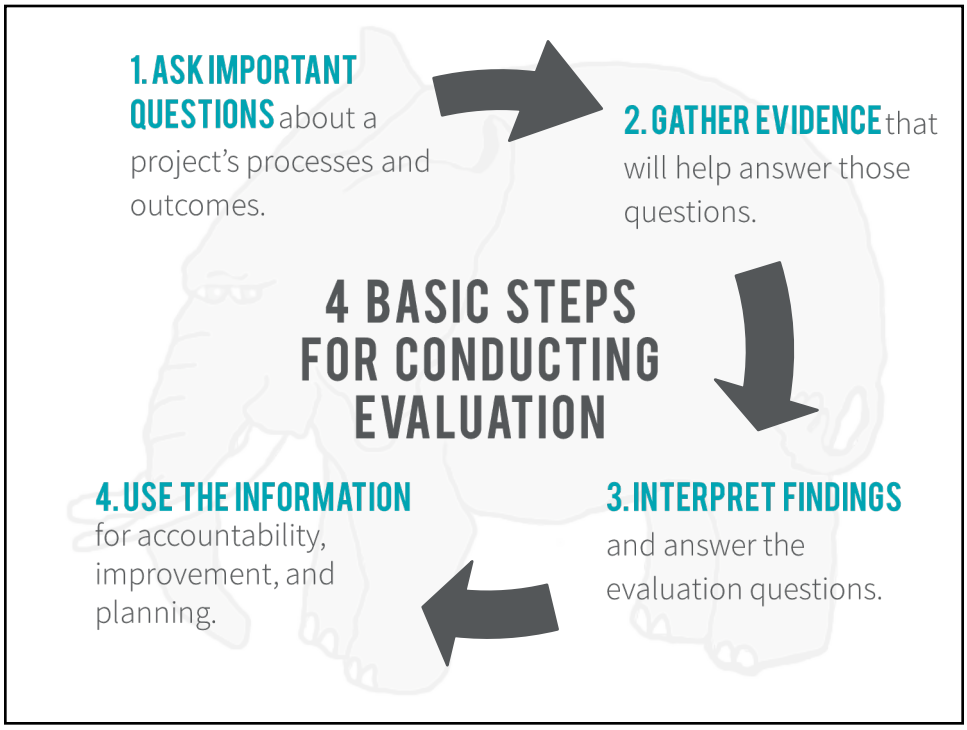
1. ASK IMPORTANT QUESTIONS about a project's processes and outcomes.
2. GATHER EVIDENCE that will help answer those questions.
4 BASIC STEPS FOR CONDUCTING EVALUATION
3. INTERPRET FINDINGS and answer the evaluation questions.


1. ASK IMPORTANT QUESTIONS about a project's processes and outcomes.
2. GATHER EVIDENCE that will help answer those questions.
4 BASIC STEPS FOR CONDUCTING EVALUATION
4. USE THE INFORMATION for accountability, improvement, and planning.
3. INTERPRET FINDINGS and answer the evaluation questions.

1. ASK IMPORTANT QUESTIONS about a project's processes and outcomes.
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4 BASIC STEPS FOR CONDUCTING EVALUATION
3. INTERPRET FINDINGS and answer the evaluation questions.
4. USE THE INFORMATION for accountability, improvement, and planning.

EVIDENCE

ACCOUNTABILITY

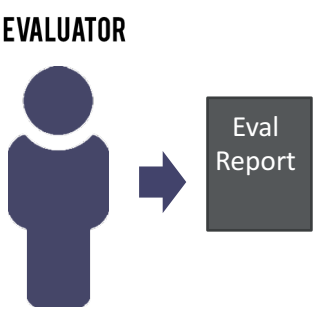
IMPROVEMENT

"The most important purpose of evaluation is not to prove, **but to improve**."

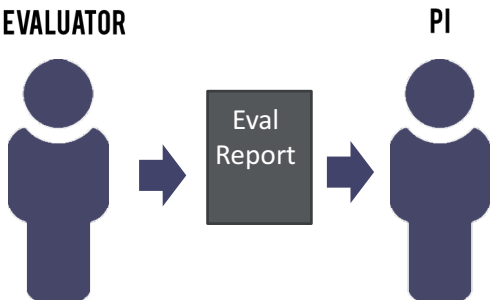
— Daniel Stufflebeam

USING EVALUATION

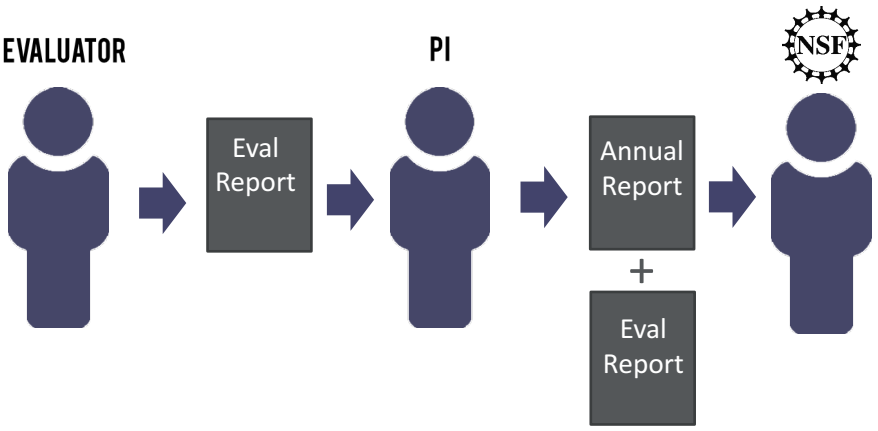
ANNUAL REPORT VS EVALUATION REPORT



ANNUAL REPORT VS EVALUATION REPORT



ANNUAL REPORT VS EVALUATION REPORT

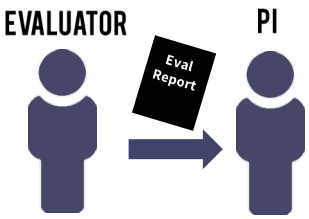


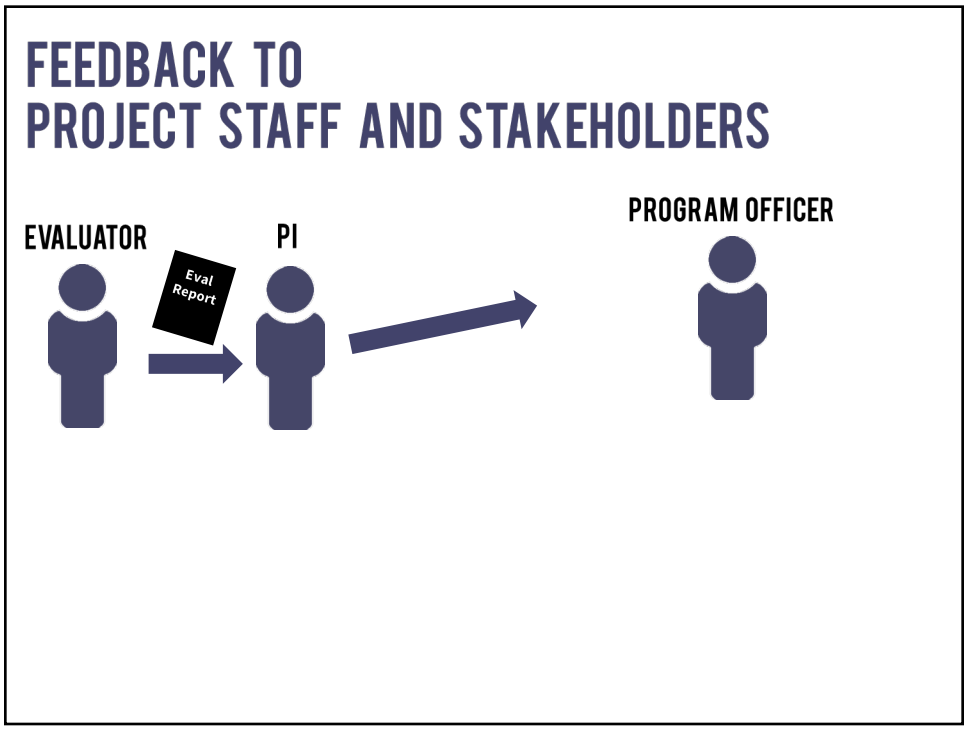
HOW TO USE EVALUATION RESULTS?

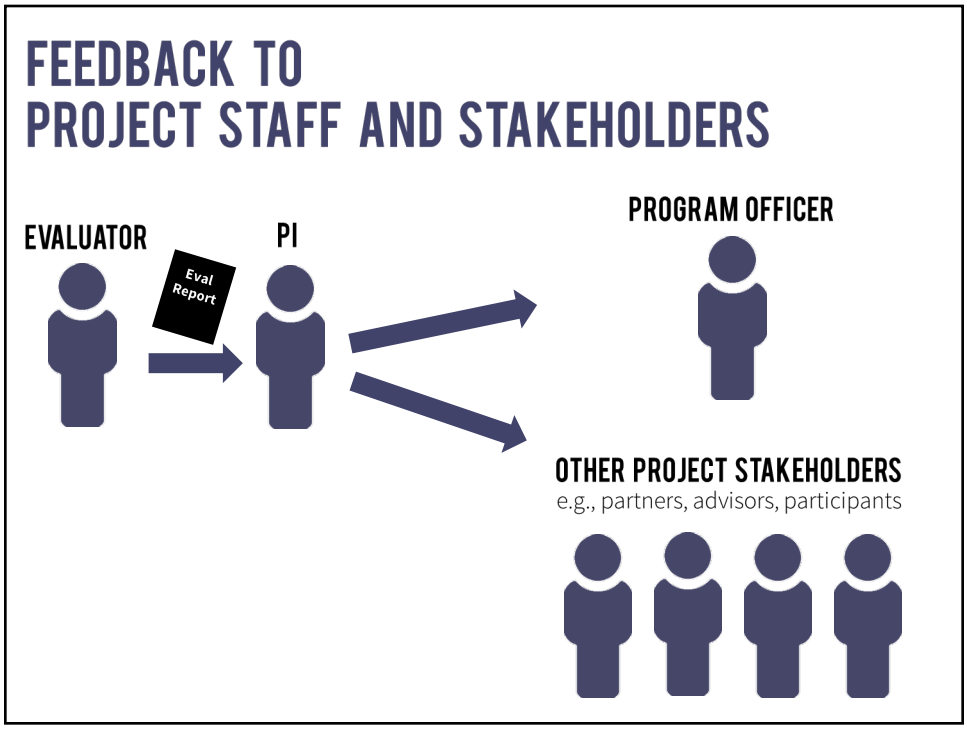
- Feedback to project staff and stakeholders
- Annual report to NSF
- Annual ATE survey
- New proposals

FEEDBACK TO PROJECT STAFF AND STAKEHOLDERS

FEEDBACK TO PROJECT STAFF AND STAKEHOLDERS




FEEDBACK TO
PROJECT STAFF AND STAKEHOLDERS
EVALUATOR
Eval Report
PI
PROGRAM OFFICER


FEEDBACK TO
PROJECT STAFF AND STAKEHOLDERS
EVALUATOR
Eval Report
PI
PROGRAM OFFICER
OTHER PROJECT STAKEHOLDERS
e.g., partners, advisors, participants

NSF ANNUAL REPORT

Cover	Accomplishments	Products	Participants	Impact	Changes/ Problems	Special Req's

RESEARCH.GOV

NSF ANNUAL REPORT

Cover	Accomplishments	Products	Participants	Impact	Changes/ Problems	Special Req's

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NSF ANNUAL REPORT

Cover | **Accomplishments** | Products | Participants | Impact | Changes/ Problems | Special Req's

- Goals
- Activities, Objectives, Results, and/or Outcomes

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ATE Annual Survey

2017 Report

evalu-ate.org/survey

NEW PROPOSALS: RESULTS FROM PRIOR NSF SUPPORT

NEW PROPOSALS: RESULTS FROM PRIOR NSF SUPPORT

"specific outcomes and results including metrics to demonstrate the impact of the project activities"

—ATE Program Solicitation

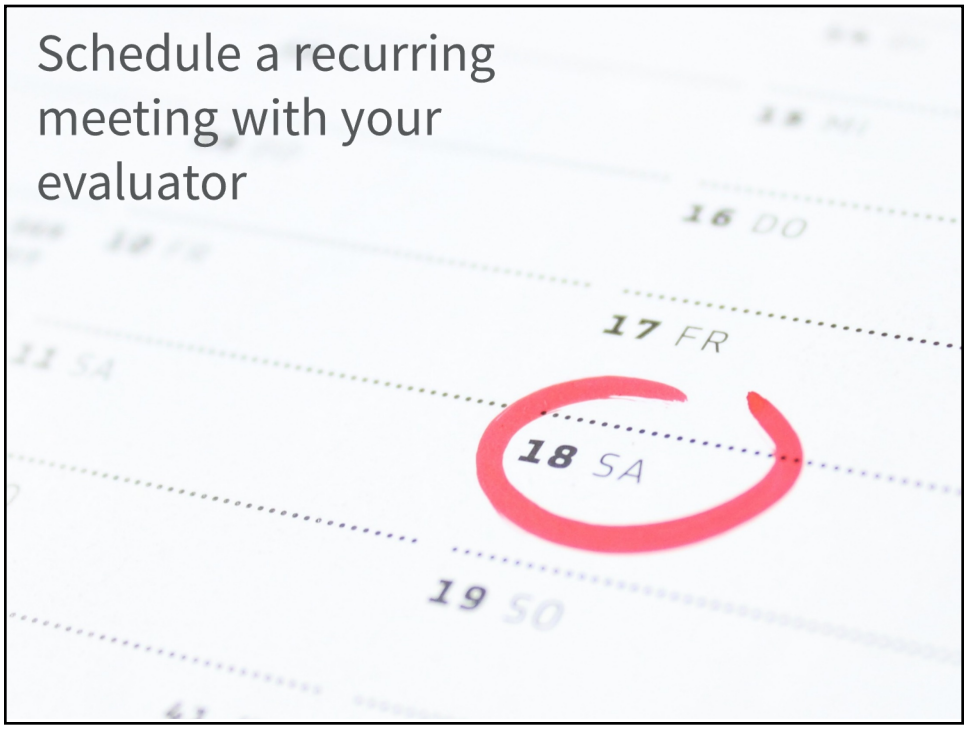
3

WORKING WITH YOUR EVALUATOR

Make sure your evaluator's contract or MOU is in place

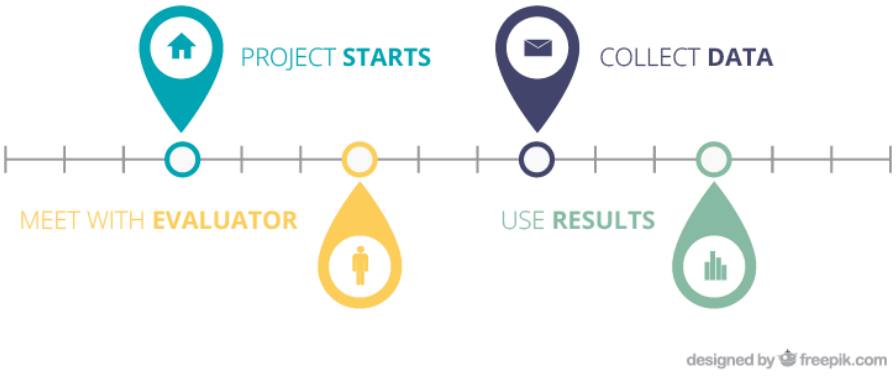
Assign a point-person for evaluation matters

Schedule a recurring meeting with your evaluator



Meet with your college's data person

Set up a timeline for your evaluation



Commit to using the evaluation results

Communication Checklist

EvaluATE

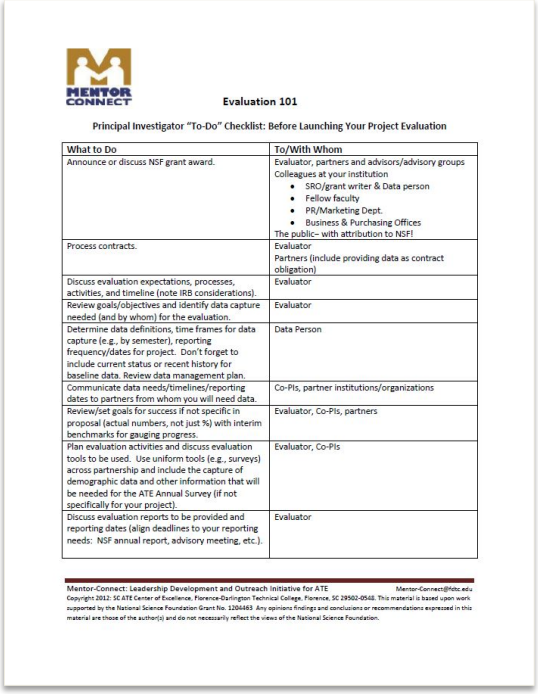
Communication Plan Checklist
for ATE Principal Investigators and Evaluators

Lyssa W. Becho and Lori A. Wingate | October 2017

Creating a clear communication plan at the beginning of an evaluation can help project personnel and evaluators avoid confusion, misunderstandings, or uncertainty. The communication plan should be an agreement between the project's principal investigator and the evaluator, and followed by members of their respective teams. This checklist highlights the decisions that need to made when developing a clear communication plan.

- ☐ **Designate one primary contact person from the project staff and one from the evaluation team.** Clearly identify who should be contacted regarding questions, changes, or general updates about the evaluation. The project staff person should be someone who has authority to make decisions or approve small changes that might occur during the evaluation, such as the principal investigator or project manager.
- ☐ **Set up recurring meetings to discuss evaluation matters.** Decide on the meeting frequency and platform for the project staff and evaluation team to discuss updates on the evaluation. These regular meetings should occur throughout the life of a project.
  - **Frequency** — At minimum, plan to meet monthly. Increase the frequency as needed to maintain momentum and meet key deadlines.
  - **Platform** — Real-time interaction via phone calls, web meetings, or in-person meetings will help ensure those involved give adequate attention to the matters being discussed. Do not rely on email or other asynchronous communication platforms.
  - **Agenda** — Tailor the agendas to reflect the aspects of the evaluation that need attention. In general, the evaluator should provide a status update, identify challenges, and explain what the project staff can do to facilitate the evaluation. The project staff should share important changes or challenges in the project, such as delays in timelines or project staff turnover. Conversations should close with clear action items and deadlines.
- ☐ **Agree on a process for reviewing and finalizing data collection instruments and procedures, and evaluation reports.** Determine the project staff's role in providing input on instruments (such as questionnaires or interview protocols), the mechanisms by which data will be collected, and reports. Establish a turnaround time for feedback, to avoid delays in implementing the evaluation.
- ☐ **Clarify who is responsible for disseminating reports.** As a rule of thumb, responsibility and authority for the distribution of evaluation report lies with the project's principal investigator. Make it clear whether the evaluator may use the reports for their own purposes and under what conditions.

This material is based upon work supported by the National Science Foundation under grant number 1204683. Any opinions, findings, and conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of NSF.



Evaluation 101

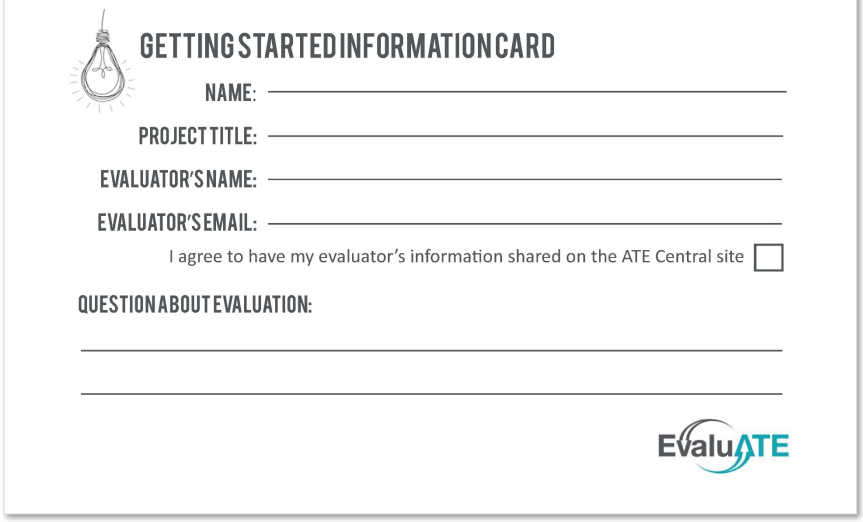
Principal Investigator "To-Do" Checklist: Before Launching Your Project Evaluation

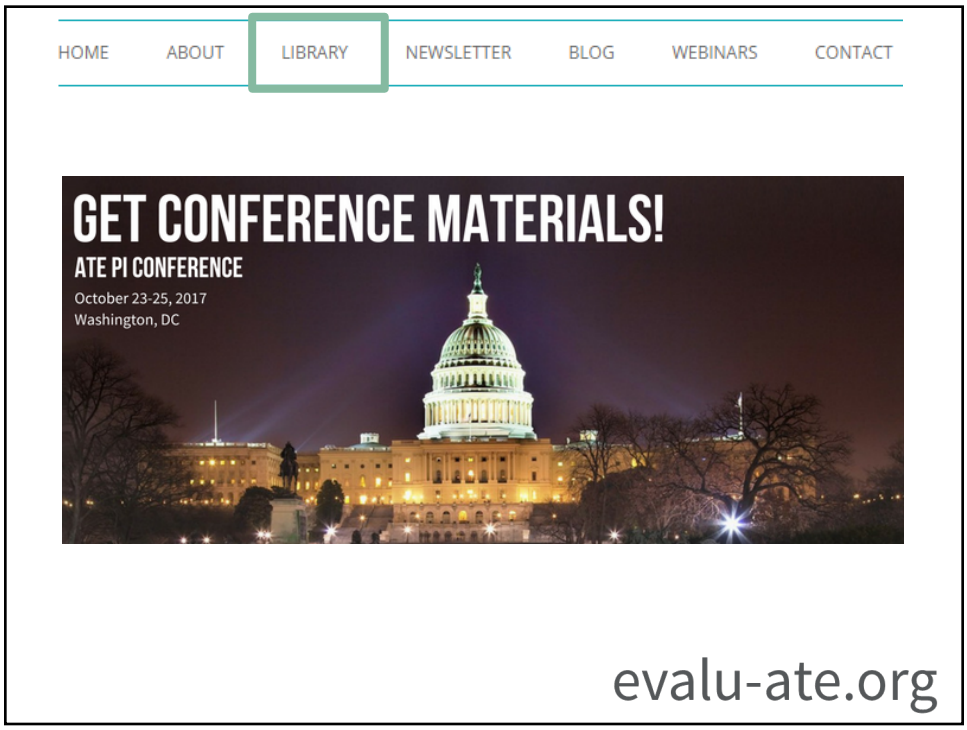
What to Do	To/With Whom
Announce or discuss NSF grant award.	Evaluator, partners and advisors/advisory groups Colleagues at your institution • SRO/grant writer & Data person • Fellow faculty • PR/Marketing Dept. • Business & Purchasing Offices The public– with attribution to NSF!
Process contracts.	Evaluator Partners (include providing data as contract obligation)
Discuss evaluation expectations, processes, activities, and timeline (note IRB considerations).	Evaluator
Review goals/objectives and identify data capture needed (and by whom) for the evaluation.	Evaluator
Determine data definitions, time frames for data capture (e.g., by semester), reporting frequency/dates for project. Don't forget to include current status or recent history for baseline data. Review data management plan.	Data Person
Communicate data needs/timelines/reporting dates to partners from whom you will need data.	Co-PIs, partner institutions/organizations
Review/set goals for success if not specific in proposal (actual numbers, not just %) with interim benchmarks for gauging progress.	Evaluator, Co-PIs, partners
Plan evaluation activities and discuss evaluation tools to be used. Use uniform tools (e.g., surveys) across partnership and include the capture of demographic data and other information that will be needed for the ATE Annual Survey (if not specifically for your project).	Evaluator, Co-PIs
Discuss evaluation reports to be provided and reporting dates (align deadlines to your reporting needs: NSF annual report, advisory meeting, etc.).	Evaluator

Mentor-Connect: Leadership Development and Outreach Initiative for ATE Mentor-Connect@fdtc.edu
Copyright 2012: SC ATE Center of Excellence, Florence-Darlington Technical College, Florence, SC 29502-0548. This material is based upon work supported by the National Science Foundation Grant No. 1204683. Any opinions findings and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the National Science Foundation.

PI "To-Do" Checklist

INFORMATION CARDS

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October 23-25, 2017
Washington, DC
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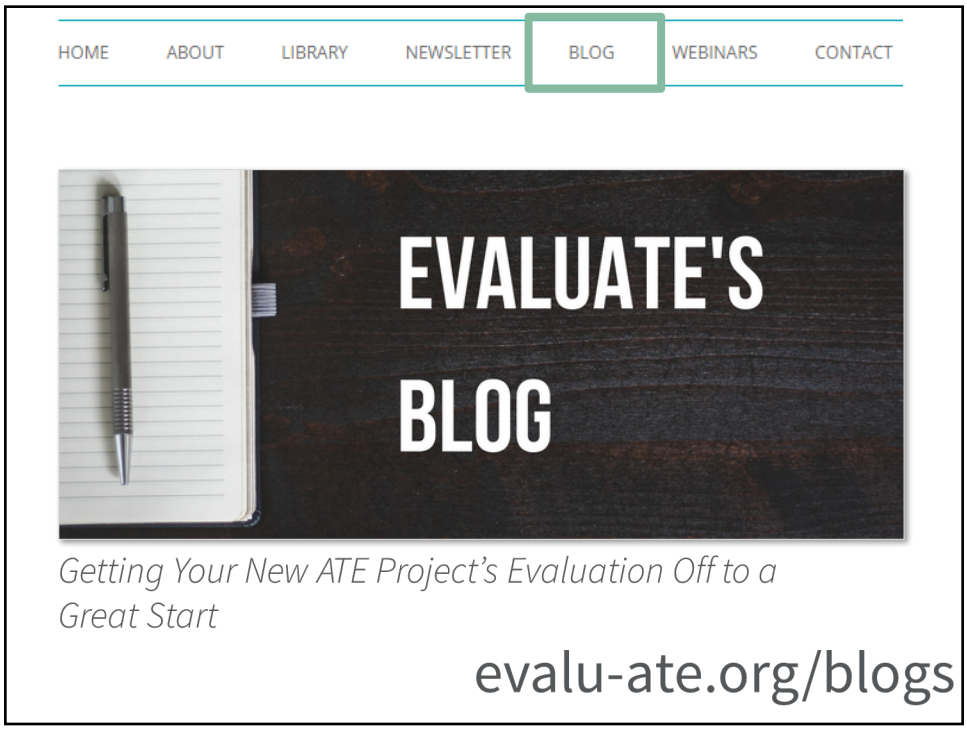
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Getting Your New ATE Project's Evaluation Off to a Great Start
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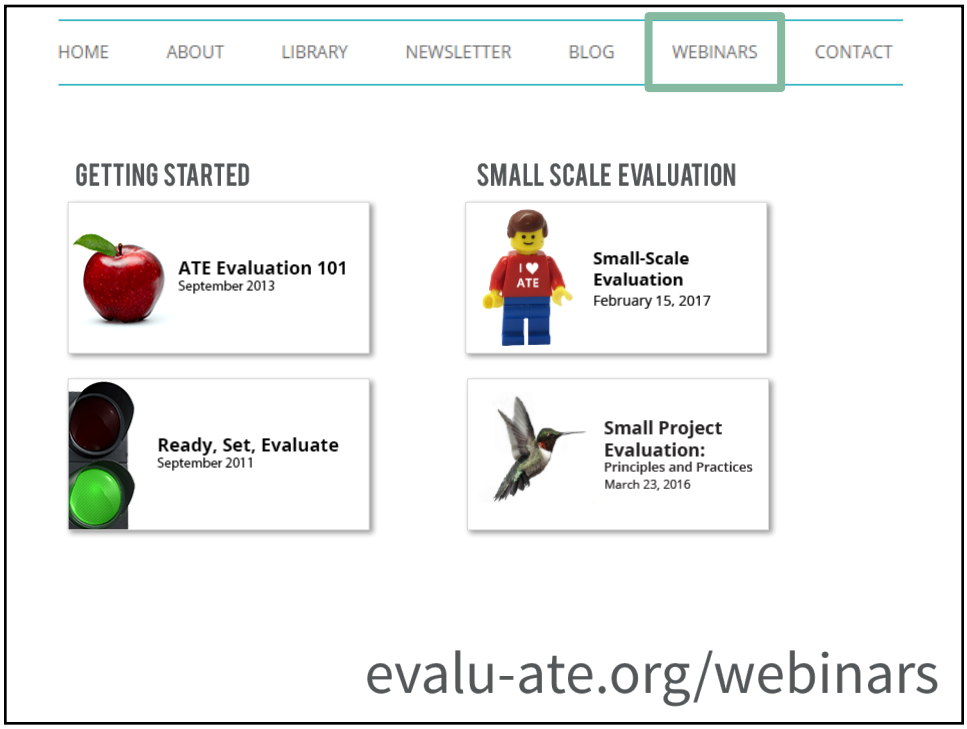
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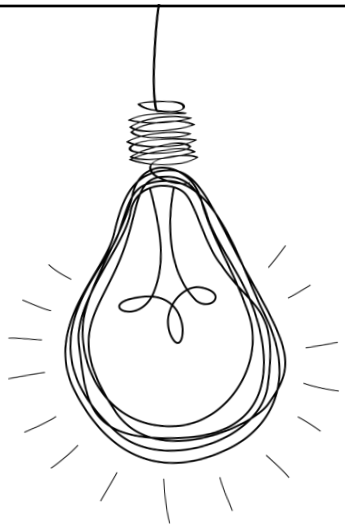
September 2013
Ready, Set, Evaluate
September 2011
SMALL SCALE EVALUATION
Small-Scale Evaluation
February 15, 2017
Small Project Evaluation:
Principles and Practices
March 23, 2016
evalu-ate.org/webinars

EVALUATION AT THE PI CONFERENCE

Mon – Wed	SHOWCASE: Booth #3
Tue 2:00 p.m.	PANEL: Strategies for Effective Evaluation Reporting
	BIRDS OF A FEATHER: Strengthening Evaluation Use in Professional Development Programs
Tue 3:15 p.m.	PANEL: When Evaluation Results Indicate It Is Time to Pivot
Wed 7:45 a.m.	ROUNDTABLE: Building a Community of ATE Evaluators



QUESTIONS?