Lessons Learned

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Maximizing Your Program's External Evaluation

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Opening the report from their external evaluation team, the leadership team from Make It Count wondered what they would find. The patterns that emerged among students enrolled in afterschool math programs showed the program had met many of its goals. Parents reported on surveys that their children, especially girls, expressed more enthusiasm about math than ever before. Outcome data showed an increase in math skills among the 350 students served in the program. On small-group tasks, girls' performance was equal to boys. However, the team saw a large gap in individual performance results between boys and girls. While the team was thrilled with the overall positive results, they wondered about the gender gap. As a result they asked their external evaluators to lead them in a deeper examination of their data. This examination of the persistent gap between girls and boys led to program changes that further enhanced math support for girls.

The scenario we've just described is fictitious, but it brings up an important question: How does data-based decision making become an integral part of program planning? From the start, the Make It Count leadership team collaborated with an experienced external evaluator. They worked to clarify their evaluation needs and developed a strong working relationship with their evaluator. Previous experience taught them the value of collecting meaningful data to measure progress toward their program goals. Therefore, they viewed evaluation as a critical part of their program, in addition to a requirement of their funders and board of directors. This enabled them to collaborate openly with their evaluator and continuously improve their project.

The Make It Count story is not unique. At Education Northwest, we have worked with a broad range of program teams to maximize the power of evaluation. In this brief, we share lessons we have learned over decades of experience that can help staff of state and local education agencies and nonprofit organizations use evaluation results for continuous improvement.

Lessons Learned About Maximizing External Evaluation

1. Be clear about your evaluation needs
2. Use appropriate measures
3. Build a strong working relationship with your evaluator
4. Ensure data presentations are useful
5. Build capacity for internal evaluation
6. Maximize the use of evaluation findings

Lesson #1 Be clear about your evaluation needs

In our Make It Count example, the program hired an external evaluator to meet multiple needs. They wanted to track student outcomes for different student groups over time. They also wanted to examine students' and families' experiences in the program. In addition, their funder required that they report specific indicators. What are *your* reasons for conducting an evaluation? Ask your team questions such as:

- **Why are we evaluating our program?** Is evaluation a funding requirement? Do we want to learn more about how our program is implemented? Do we want to see whether the program is making a difference? Are we scaling the program up or launching into something else? Are we trying to decide whether to retain it?
- **What questions do we *need* to answer?** For example, does our funder have specific goals and objectives that need to be measured? Do we need to report to

Select the Right Evaluator

Your program deserves an evaluator with a track record of conducting evaluations similar to yours in terms of content and scope, as well as an evaluator who has a compatible working style. That evaluator may not be the one with the biggest name or lowest price tag. Here are a few places to start your search:

- Evaluation Finder tool from the American Evaluation Association http://www.eval.org/find_an_evaluator/evaluator_search.asp
- What Works Clearinghouse Registry of Evaluation Researchers http://ies.ed.gov/ncee/wwc/references/registries/EVLSearch.aspx
- The national evaluation professional association—the American Evaluation Association (AEA)—or its local affiliates, such as the Oregon Program Evaluators Network (OPEN) http://www.eval.org/find_an_evaluator/evaluator_search.asp http://oregoneval.org
- The Evaluation Center at Western Michigan University http://www.wmich.edu/evalctr
- Office of Planning, Research and Evaluation Administration for Children and Families, U.S. Department of Health and Human Services http://www.acf.hhs.gov/sites/default/files/opre/program_managers_guide_to_eval2010.pdf
- Bureau of Justice Assistance, U.S. Department of Justice https://www.bja.gov/evaluation/guide/bja-guide-program-evaluation.pdf
- National Science Foundation http://www.westat.com/Westat/pdf/news/UFHB.pdf

our funder on specific measures such as those outlined in the federal Government Performance and Results Act [GPRA]?

- **What questions do we *want* to answer?** Are there things we are interested in learning about that an evaluator could measure?
- How will the evaluation help us improve the program's operation over time? What kinds of feedback do we want from an evaluator and how often?

The best time to examine your reasons for seeking an external evaluation is early on, before the program has begun. Your answers will help you develop a clear statement of evaluation needs and a corresponding budget. From this statement, you can develop an evaluation request for proposal (RFP) or a formal request for evaluation that providers can use to explain how they would conduct your evaluation and what it would cost. Alternately, you could use it to develop a less formal set of interview questions for potential evaluators.

A clear vision of your evaluation needs will help you consider whether applicants have the right knowledge, skills, and capacity to meet those needs. Without a clear statement, you risk spending considerable resources later in the project clarifying your needs. You may also run the risk of attracting an evaluator who is not a good match.

Lesson #2 Use appropriate measures

In our evaluation work, we usually collaborate with project leaders to select metrics, measurements, and assessments that are tightly linked to the project's activities and will provide compelling evidence of goal accomplishment. For example, you will want to measure more than just teacher *attitude*, if the goal of your program is to change teacher *practice*. In our experience, good evaluation measures:

- Show the success of the project on meaningful indicators
- Gauge progress toward specific progress goals and ultimately determine the extent to which the goals of the project were met
- Inform continuous improvement or contribute to the design of future programs
- Are minimally intrusive to participants
- Are flexible to support modified program design and evaluation needs

Examining your program's logic model can help you match your evaluation measures to your program goals and objectives. A good logic model accurately portrays goals and objectives that are well-aligned to project activities and implementation (see resources on page 3). Before selecting evaluation measures, we often work with clients to establish or confirm their project logic model. This helps guide the selection of well-aligned evaluation measures. For example, a goal of "improved student achievement" might have several associated objectives. Each of these could be measured with a number of different instruments, such as students' course grades, formative assessments, and standardized test scores.

By using meaningful measures from the beginning, evaluators are able to continue to track project participants and analyze long-term influences of project involvement.

Lesson #3 Build a strong working relationship with your evaluator

Productive project leader-evaluator relationships take time to cultivate and require effort to develop norms of working together. Regular, ongoing communication between the project leaders and the evaluator is critically important because it keeps the evaluator abreast of any changes, developments, challenges, and successes. Establishing common expectations for the frequency and type of communications can avoid problems down the road.

What does ongoing communication look like? In our experience, it can take many forms. For example, in one evaluation we used monthly Skype™ meetings between the project leader and evaluator to hear project updates and report on evaluation issues. Skype allowed us to "see" each other, while not incurring the cost of face-to-face meetings. In another evaluation, the client actively helped develop the specific instruments for the evaluation through e-mailed document exchange. Since people have different communication styles and preferences, try to match your style with your evaluator's, or do your best to recognize the differences in your styles and respond to them.

In many of our evaluations, we have played the role of "critical friend": someone who gives program staff members objective feedback on their program to inform continuous improvement. In other instances, especially high-stakes evaluations such as randomized controlled trials of program effectiveness, we built a strict "fire wall" between evaluator and client in order to maintain complete independence and objectivity. What kind of relationship do you want to build with your evaluator?

Lesson # 4 Ensure data presentations are useful

As Henry Louis Gates Jr. noted, "Collecting data is only the first step toward wisdom, but sharing data is the first step toward community." The Make It Count team improved its program based on data from their evaluation because the information was shared via comprehensible charts and tables with clear narrative.

As evaluators, we have had the most success conveying findings when we match our presentation style and content to the intended audience. That is, we have tailored reports, displays, or presentation materials to meet varying needs. For example, one evaluation required a full report with technical language for the funder. Another included an interactive presentation of findings for project staff members and a one-page written summary for legislators. Make sure your evaluator understands the multiple audiences for the evaluation and how the data might be conveyed to each stakeholder group. Work with your evaluator to ensure that the language, data displays, and conclusions of presentations help "tell the story" of your project to various audiences.

Lesson # 5 Build capacity for internal evaluation

Over time, we have seen many clients develop their own capacity to collect and analyze data. Building this capacity not only can save money, but it allows programs to use more frequent and targeted data collection to inform program decisions. Clients can learn these skills formally (e.g., by taking a methods class) or informally (e.g., by working closely with the evaluator to develop protocols and templates).

Increased internal capacity, however, may never replace the need for an external evaluator. Organizations need to be realistic about the time and staff resources required to conduct a robust evaluation and they should also acknowledge the value of having an independent, third party examine their operations and results.

Lesson # 6 Maximize the use of evaluation findings

We have seen clients use evaluation findings as a powerful catalyst for program change. As in the Make It Count story, evaluation results can confirm or discredit assumptions, celebrate success, focus attention on an issue, and help build a culture of inquiry and continuous

Learn More About Logic Models

W.K. Kellogg Foundation Logic Model Development Guide
http://www.wkkf.org/knowledge-center/resources/2006/02/wk-kellogg-foundation-logic-model-development-guide.aspx

The Pell Institute and Pathways to College Network
http://toolkit.pellinstitute.org/evaluation-guide/plan-budget/using-a-logic-model

Ready To Plan Your Evaluation?

Whether you need help thinking about budget considerations or how to negotiate an agreement with your evaluator, a checklist will help guide your plans. Developed by scholars and internationally-respected evaluators, the checklist housed at Western Michigan University can be used by project staff members, as well as evaluators.

See http://www.wmich.edu/evalctr/checklists/evaluation-checklists.

improvement. This is more likely to happen when multiple stakeholders have opportunities to discuss and apply the evaluation results to meaningful program decisions.

Groups to consider as users of evaluation results include:

- Funders or board members
- Program administrators
- Program participants (e.g., teachers and administrators)
- Other stakeholders (e.g., students, parents, volunteers, community partners)
- Directors of similar projects

At Education Northwest, we have facilitated multiple types of forums for stakeholders to process evaluation information, ask questions, discuss implications, and make decisions. In one evaluation, for example, the program administrators and evaluator had a three-part meeting to discuss the findings and formulate recommendations together. For an audience of teachers in that same project, the evaluator prepared school-level data reports and teams discussed the implications of their school's results in contrast to all schools in the project. Program funders took part in a more formal presentation of results and recommendations.

To maximize the utility of your evaluation, think about how you will use the evaluation from the very beginning of your project. Ask your evaluator what role he or she can play in presenting results to multiple stakeholders. Include internal and external dissemination of findings in your initial timeline and budget. Invite other program staff members to create opportunities to use the evaluation results. And, consider how to use evaluation findings in an ongoing way—not just once a year.

Summary

As in the Make It Count scenario, we've seen firsthand how working collaboratively with external evaluators can maximize the value of the evaluator's work. In the simplest terms, external evaluation can tell you what you are doing and whether it is making a difference. Evaluation can help improve a program and help leaders make decisions about which programs should be retained or discontinued. The evaluation results can also lend legitimacy to what you are doing and thereby create a research base for future funding.

No single solution makes an evaluation successful. Instead, success depends on a complex interaction of people, methods, and a genuine interest in looking critically at program challenges and successes. We hope that these lessons learned help you get the most from your evaluation and create a project team culture that values, understands, and uses your evaluation results.

Education Northwest has a well-established track record of conducting evaluations focused on improving outcomes in education and other social sectors. For more information on this service, contact Theresa Deussen (Theresa.Deussen@educationnorthwest.org), 503.275.9631 or Terri Akey (Terri.Akey@educationnorthwest.org), 503.275.9629.

Founded in 1966 as Northwest Regional Educational Laboratory, Education Northwest works with schools, districts, and communities on comprehensive, research-based solutions to the challenges they face. Four priorities frame our work: supporting educators; strengthening schools and districts; engaging families and communities; and conducting research, evaluation, and assessment. Access additional issues of *Lessons Learned*, a series that distills our experience and research, in the Resources section of educationnorthwest.org.

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