Love Your Evaluator

A WORKSHOP BY
GARY LICHTENSTEIN, ED.D.

Quality Evaluation Designs

Highest Quality · On Time · On Budget

20 Years: 1996 - 2016

ENGINEERING EDUCATION CENTERS' GRANTEES CONFERENCE
OCTOBER 30, 2017

Gary Lichtenstein, Ed.D.

- **Founder & Principal of Quality Evaluation Designs (1996-Present)**
- **Asst. Research Scientist in the Ira A. Fulton Schools of Engineering at Arizona State Univ. (1/2017-Present)**
- **Background in Program Development & Implementation**
- **Extensive experience evaluating NSF Grants**
- **Intellectual Interests:**
  - **Engineering Education**
  - **Entrepreneurship in Engineering Education**
  - **Mixed-Methods Research**
  - **Community-Based Participatory Research**
  - **Refugee Integration**

Disclaimer: The views expressed are those of the speaker and represent only the opinions of those who agree.

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Today's Session

|	
1. **WHAT DO EVALUATORS DO (& HOW DO WE DO IT)?**	**2.** **HOW CAN YOU GET THE MOST VALUE FROM YOUR EXTERNAL EVALUATOR?**

Experience with External Evaluators
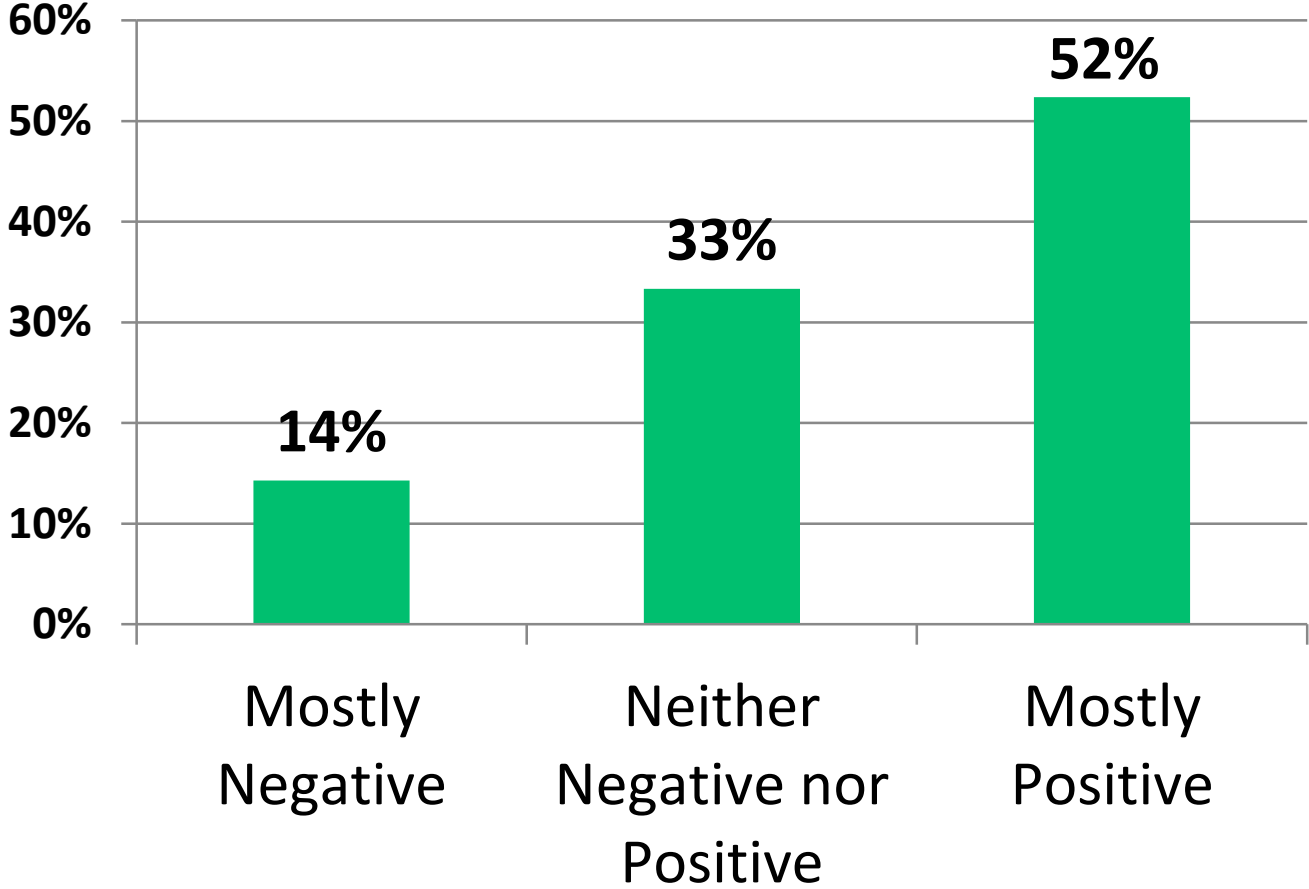## Survey Summary

The survey is still open!

Please take a few minutes to complete the survey in order to keep the converstation going. Here's the link:

https://www.surveymonkey.com/r/EECee

On approximately how many projects have you worked with an External Evaluator?
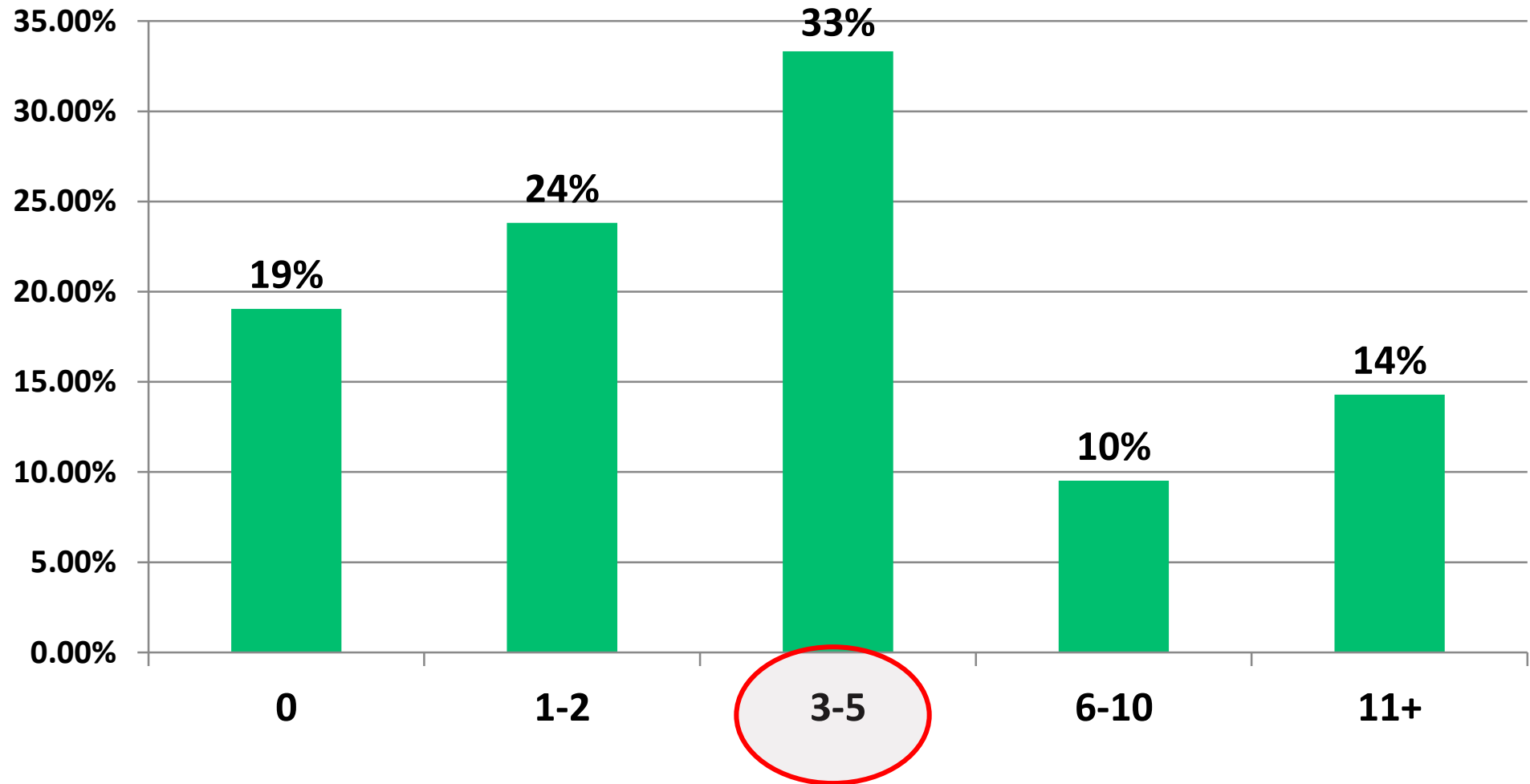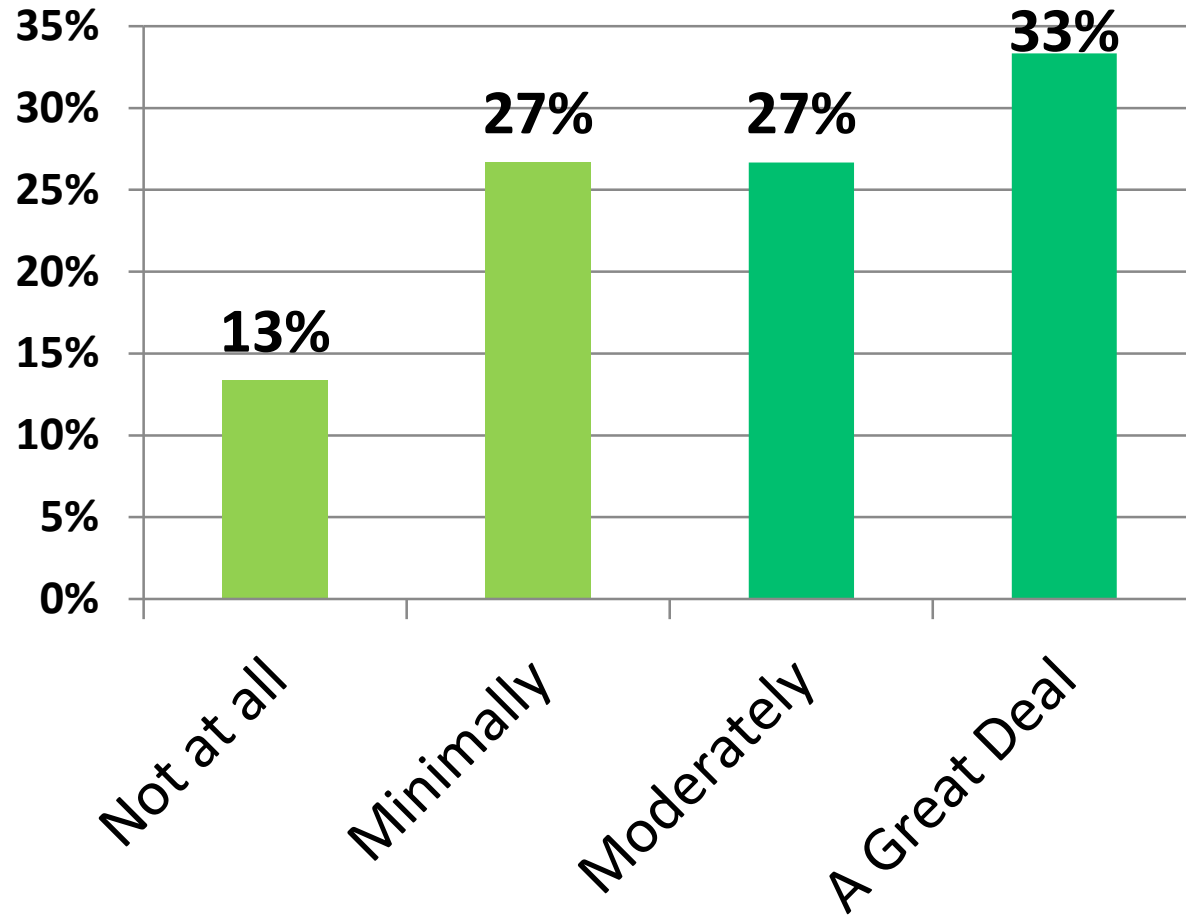
OVERALL, MY EXPERIENCE WITH EXTERNAL EVALUATORS HAS BEEN…

OF NOTE….

- **100%** of PIs who worked with External Evaluators 6 or more times rated their overall experience as *Mostly Positive*. **50%** of those who worked with evaluators 1-5 times reported *Mostly Positive* experience overall.

# HAS YOUR EXTERNAL EVALUATOR ADDED VALUE TO YOUR EEC (n=15)

OF NOTE

- PIs whose evaluators added *A Great Deal* to their EEC project were more likely to report that the External Evaluator...
  - ✓ *Attended 2 or more project meetings*
  - ✓ *Reported findings to the project team*
  - ✓ *Vetted results with the project team*

60% Moderate + A Great Deal
40% Not At All + Minimal

WOULD YOU HIRE AN EVALUATOR IF IT WEREN'T REQUIRED?

Bar chart:
- Probably not: 24%
- Probably: 29%
- It depends: 48%
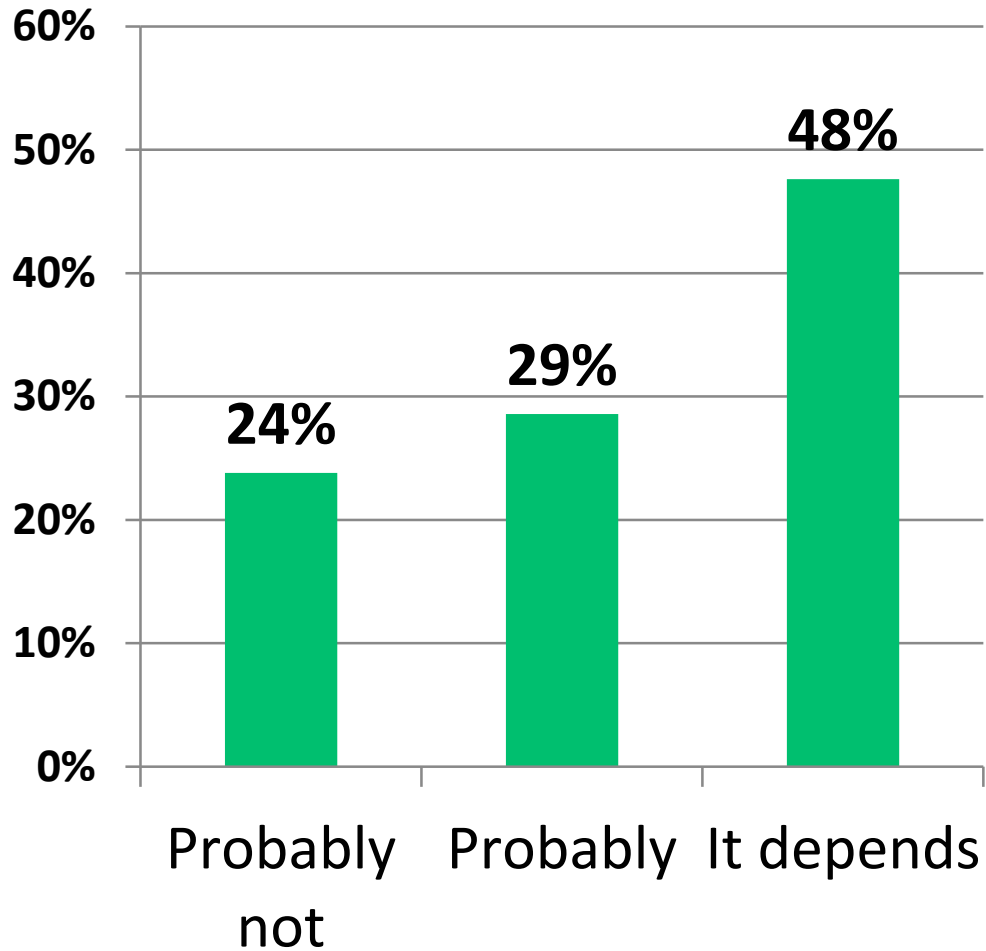
IT DEPENDS ON....

- *I find that I do a better job at evaluating.*

- *Cost and value to the project.*

- *Evaluators add cost and I have to track them down for deliverables.*

- *Sometimes an advisory board is more valuable; sometimes an evaluator. It depends on the project.*

- *They never seem to add value. They cost a lot. They want to keep getting the money so they write happy evaluations.*

- *Some external evaluators have been a vital part of the team. They have attended meetings, offered insight and suggestions for research, and provided comprehensive reports of the research team dynamics and research progress.*

1. What do evaluators do (& How do we do it)?

> **We only ever ask 3 questions.**

> **We are masters of the Logic Model.**

> **(We can also do IRB's and DMP's!)**

The ONLY 3 Questions Evaluators Ever Ask

1. *Is/Was the grant being implemented as proposed—on schedule, with expected deliverables?*

2. *How effective are/were the strategies in achieving proposed outcomes?*

3. (We ask this a lot)

Same Questions, Different Focus

FORMATIVE	SUMMATIVE

- *How's it going?*
- When the cook (PI/ Project Team) tastes the soup.

- *How Did it Go?*
- When the customer (funder) tastes the soup.

1. *Is/Was the grant being implemented as proposed— on schedule, with expected deliverables?*

☑ **Strategic Planning:** *the process by which a Project team maps out how and when to implement strategies and objectives to achieve desired outcomes.*

☑ **Leadership**: *project management, frequency and effectiveness of meetings, tone and quality of relationships within and across institutions.*

☑ **Communication:** *clarity between PIs, administrators, students and others about roles, timelines, and deliverables.*

2. *How effective are/were the grant strategies in achieving proposed outcomes?*

2a. Were the strategies implemented with fidelity?

2b. Were the strategies effective?

I trust my gut,
Our project is too complex
for logic and evidence.
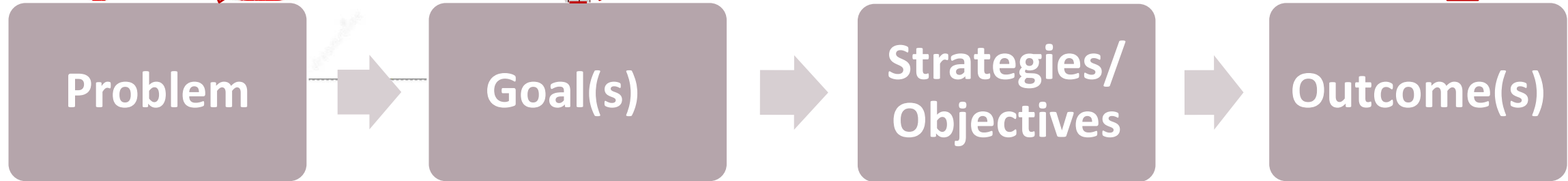
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2. The Logic Model

An essential tool evaluators use throughout the life of a project to ensure that project goals, activities, and outcomes align.

Problem → Goal(s) → Strategies/Objectives → Outcome(s)

The Logic Model

EXAMPLE

GOAL ACHIEVED

How effective were strategies in achieving grant outcomes?

| Problem	➔	Goal(s)	➔	Strategies/ Objectives	➔	Outcome(s)

Problem

Lack of impact of NSF funded grants due to no or limited adoption of project deliverables when grants end.

Goal(s)

Build entrepreneurial behavior among NSF PIs so they design grant projects with an innovation mentality.

Strategies/Objectives

Strategy: 8 week, I-Corps L Course
Objectives: Learn Customer Discovery, Value Propositions, and Customer- vs. Feature-Focused Innovation

Outcome(s)

- PIs increase the value of their innovations to customers for broader adoption.
- More projects sustained after grant funding

3.

WHY?

EFFECT

EFFECT

EFFECT

CAUSE
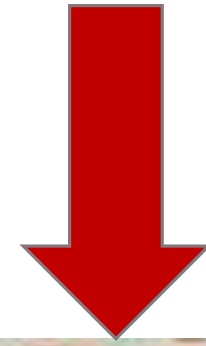
Describe vs. Explain

These Key Words are reminders to elaborate on evidence

Describe	Explain
·give examples	·give reasons
·give evidence	·analyze
·retelling bit by bit	·reasons why or explanations of how

Nobody cares about my opinion—I'm hired to get great data.

This is a list of who asked for ~~your~~ opinion.
my

yourecards
someecards.com

Your evaluator should be able to draw a solid and convincing line from data to findings in order to explain WHY.

"If your evaluation process is one large hoop to jump through – STOP. Re-calibrate and move forward."

– PJ Caposey in Education Week Teacher

Expect Your Evaluator To…

- ✓ Vet findings with you and/or your team, swap perspectives, clarify fuzzy points, and entertain alternative interpretations
- ✓ Highlight patterns of results, not isolated data points
- ✓ Accentuate what's working and why, as well as challenges
- ✓ Articulate strengths, weaknesses, and challenges that are both familiar and new; sometimes in new ways
- ✓ Present information that was unexpected about what works and/or what doesn't, and why

HOW TO GET THE MOST VALUE FROM YOUR EXTERNAL EVALUATOR

1. Bring your evaluator on board early—preferably at the proposal stage.

2. Make your evaluator familiar to the project team.

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What kind of evaluation did you need?

Our 3 year project is coming to an end and were told we needed an evaluation.

What kind is that?

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1. Bring your evaluator on board early—preferably at the proposal stage.

- ✓ The evaluator is an expert in linking goals to strategies to objectives to outcomes—applying a logic model can identify gaps
- ✓ The proposal process is also the process of team-building, and, ideally, you want your evaluator to be a valued partner
- ✓ The evaluator can create a Data Management Plan (DMP)

Voice of Experience

o *It's imperative to set up regular meetings in the beginning to go through everything and make sure you are on the same page. When we first started, we had weekly meetings for a year so that we could go through everything that needed to be addressed. Since then, we meet on a more monthly basis, but when getting set up, it was really helpful to everyone to have constant communication.*

--EEC PI

2. Make your evaluator familiar to the project team.

Once funding is received, ***get the subaward in place ASAP.*** Involve the EE in project launch, especially any initial project team meetings.

So that the …

a) …evaluation questions, methods, deliverables, and activities are clear to all PIs and staff and integrated relatively seamlessly into project rollout

b) …evaluator's value as a resource to the team/project is understood by the whole project team

c) …evaluator's role and value are clearly endorsed by the PIs, which leads to better data collection and higher response rates

a) …evaluator can both observe team dynamics and build relationships with team members.

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QUIZ

1. WHAT DO EVALUATORS DO (& HOW DO WE DO IT)?

➤ **What are the only 3 questions evaluators ask?**

➤ **What's the value of a logic model?**

2. HOW CAN YOU GET THE MOST VALUE FROM YOUR EXTERNAL EVALUATOR?

1. What are 2 reasons for getting the evaluator on board as soon as possible after receiving grant funding?

2. **TRUE** OR **FALSE**?

An evaluator who becomes a partner to the project team risks compromising the evaluation due to losing objectivity.

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2 THINGS YOU CAN DO:

1) TAKE THE *LOVE YOUR EVALUATOR* SURVEY: HTTPS://WWW.SURVEYMONKEY.COM/R/EECEE

2) CHECK OUT THIS RESOURCE:
THE 2002 USER FRIENDLY HANDBOOK FOR PROJECT EVALUATION, JOY FRECHTLING (WESTAT), PREPARED UNDER NSF CONTRACT REC99-12175. ARLINGTON, VA: NATIONAL SCIENCE FOUNDATION: DIRECTORATE FOR EDUCATION AND HUMAN RESOURCES AVAILABLE AT:
HTTPS://WWW.NSF.GOV/PUBS/2002/NSF02057/NSF02057.PDF

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