Getting Started with Your ATE Evaluation

**EVALUATION BASICS**
- Key questions should focus on the project’s processes and outcomes, and should address the following points:
  - How do you know the project was successful?
  - How do you know the project made a difference?
  - How do you know participants were affected positively?

**USING EVALUATION**
- Assess your project’s outcomes and impacts.
- Evaluate the effectiveness of your evaluation methods.
- Refine your evaluation approach.

**WORKING WITH YOUR EVALUATOR**
- Set clear expectations and goals for your evaluation.
- Collaborate on project activities and evaluation.
- Sustain the evaluation process.

**LEARN MORE**
- Resources: Evaluating ATE projects and your evaluator.
- Website: www.evalu-ate.org

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ATE PI CONFERENCE | October 2017

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www.evalu-ate.org
1 EVALUATION BASICS
It’s research!

It’s our advisory committee’s feedback!

It’s someone else saying if we met our goals!

It’s a survey!

It’s course evaluations!

It’s the NSF annual report!

EVALUATION

Image source: expertcytometry.com
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
1. Ask important questions about a project’s processes and outcomes.

4 Basic Steps for Conducting Evaluation

2. Gather evidence that will help answer those questions.
1. **ASK IMPORTANT QUESTIONS** about a project's processes and outcomes.

2. **GATHER EVIDENCE** that will help answer those questions.

3. **INTERPRET FINDINGS** and answer the evaluation questions.

4. **USE THE INFORMATION** for accountability, improvement, and planning.

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1. Ask important questions about a project's processes and outcomes.

2. Gather evidence that will help answer those questions.

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

2 USING EVALUATION
ANNUAL REPORT VS EVALUATION REPORT

EVALUATOR

PI

Eval Report

Eval Report
ANNUAL REPORT VS EVALUATION REPORT

EVALUATOR

PI

NSF

Eval Report

Annual Report

Eval Report

Annual Report

+ Eval 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

EVALUATOR

FEEDBACK TO PROJECT STAFF AND STAKEHOLDERS

EVALUATOR

PI

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FEEDBACK TO PROJECT STAFF AND STAKEHOLDERS

EVALUATOR ➔ PI ➔ PROGRAM OFFICER

FEEDBACK TO PROJECT STAFF AND STAKEHOLDERS

EVALUATOR ➔ PI ➔ PROGRAM OFFICER ➔ OTHER PROJECT STAKEHOLDERS

e.g., partners, advisors, participants
## NSF ANNUAL REPORT

<table>
<thead>
<tr>
<th>Cover</th>
<th>Accomplishments</th>
<th>Products</th>
<th>Participants</th>
<th>Impact</th>
<th>Changes/Problems</th>
<th>Special Req’s</th>
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![NSF Research.gov Logo]

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**RESEARCH.gov**
**NSF ANNUAL REPORT**

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

**ATE Annual Survey**

2017 Report

[evalu-ate.org/survey](http://evalu-ate.org/survey)
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 Plan Checklist
for ATE Principal Investigators and Evaluators

Creating a clear communication plan at the beginning of an evaluation can help project personnel and evaluators avoid confusion, misunderstandings, or conflict. 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 be made when developing a clear communication plan.

- Designate one primary contact person from the project staff and one from the evaluation team. Identify who should be consulted regarding questions, changes, or general updates about the evaluation. The contact 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 duration. The project staff and evaluation team should discuss matters on the evaluation plan. This meeting should be an opportunity for the project staff and evaluation team to discuss matters.

- Frequency – A minimum of monthly evaluations or quarterly evaluations on the evaluation plan. weiter wide meetings will help ensure that everyone involved receives adequate attention to the matters being discussed. Do not rely on email or other asynchronous communication platforms.

- Agenda – The agenda should reflect the goals of the evaluation. The evaluation 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. Integrate the project staff’s role in providing input on instrumentation, data collection, and evaluation reports. Establish a timeline for feedback, to avoid delays in implementing the evaluation.

- Clarify which is responsible for disseminating reports. As a rule of thumb, responsibility and authority for the distribution of evaluation reports 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.

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INFORMATION CARDS

GETTING STARTED INFORMATION CARD

NAME: ____________________________

PROJECT TITLE: ____________________

EVALUATOR'S NAME: _______________

EVALUATOR'S EMAIL: ________________

I agree to have my evaluator’s information shared on the ATE Central site [ ]

QUESTION ABOUT EVALUATION: ____________________________________________

[Blank]

ATE PI CONFERENCE | October 2017

www.evalu-ate.org
GET CONFERENCE MATERIALS!
ATE PI CONFERENCE
October 23-25, 2017
Washington, DC

evalu-ate.org

EVALUATION ONBOARDING
Fall 2017 newsletter

evalu-ate.org/newsletters
Getting Your New ATE Project’s Evaluation Off to a Great Start

evalu-ate.org/blogs

GETTING STARTED
ATE Evaluation 101
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**

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