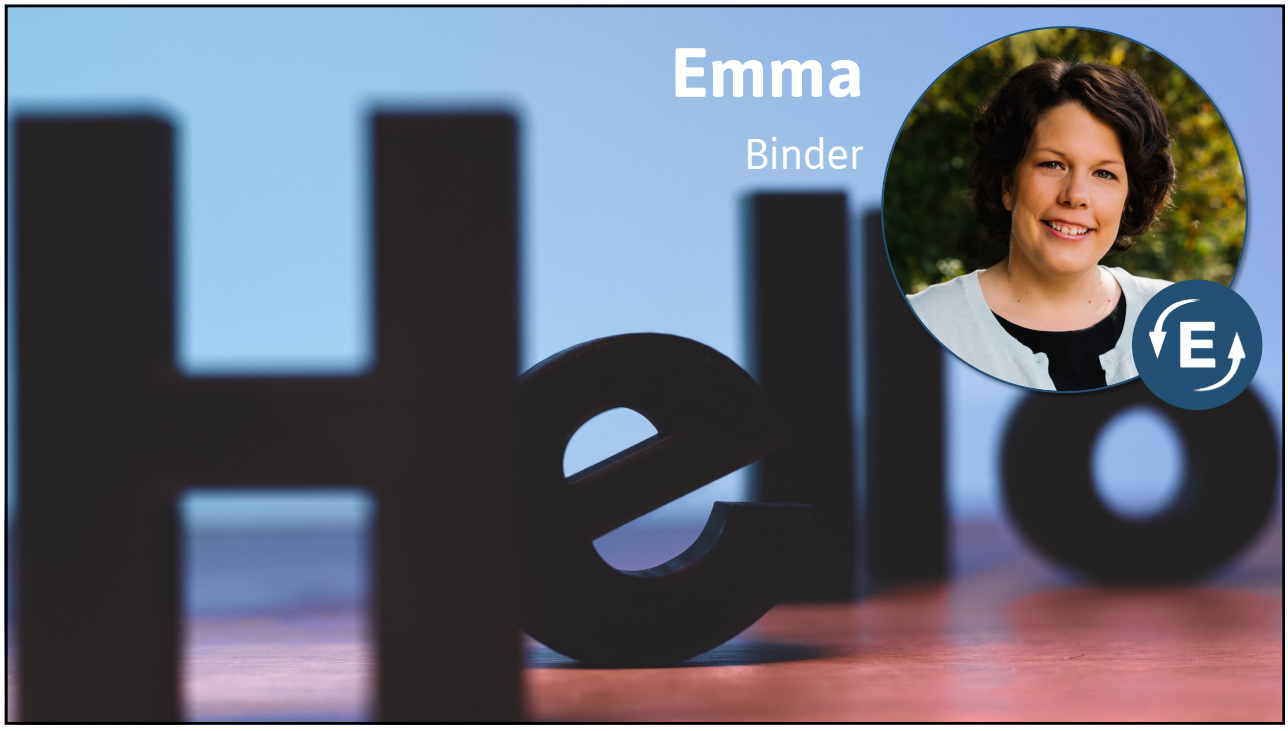
evaluation crash course for
NON-EVALUATORS
begins at 1 p.m. Eastern


Emma
Binder

# Behind the Scenes

**Ana**
Councell

**Megan**
Zelinsky

**Carolyn**
Williams-Noren

**Lyssa**
Wilson Becho

**Erika**
Sturgis

# Thank You

**Elaine**
Craft

MENTOR CONNECT

**Emery**
DeWitt

*thanks!*

EvaluATE

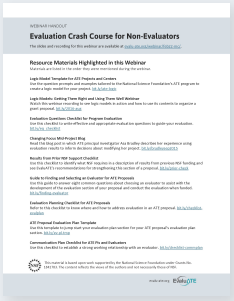
TRAINING COMMUNITY RESEARCH ATE SURVEY

www.evalu-ate.org

This material is based upon work supported by the National Science Foundation under Grants No. 1841783. The content reflects the views of the authors and not necessarily those of NSF.

# Materials

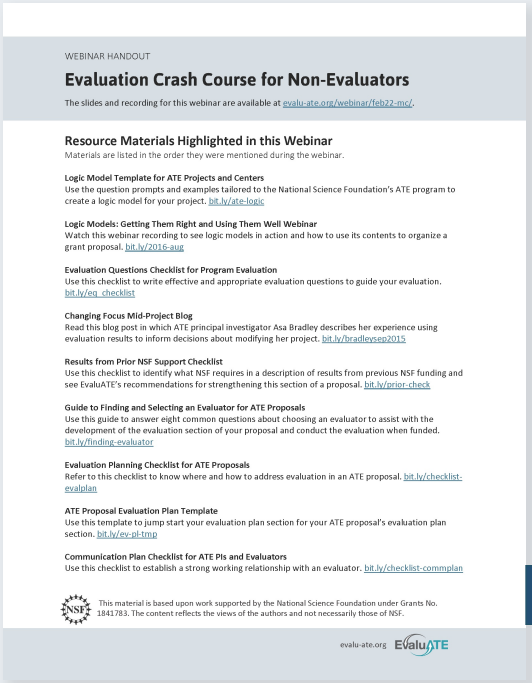
Slides




Resources

Recording

www.evalu-ate.org/webinar/feb22-mc



WEBINAR HANDOUT

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DOWNLOAD NOW IN THE HANDOUT TAB

March 1
WEBCHAT
MENTOR CONNECT

START

## SECTION 1

What is evaluation?

QUESTION BREAK

## SECTION 2

Why do it?

QUESTION BREAK

## SECTION 3

How much does it cost?

Who can do it?

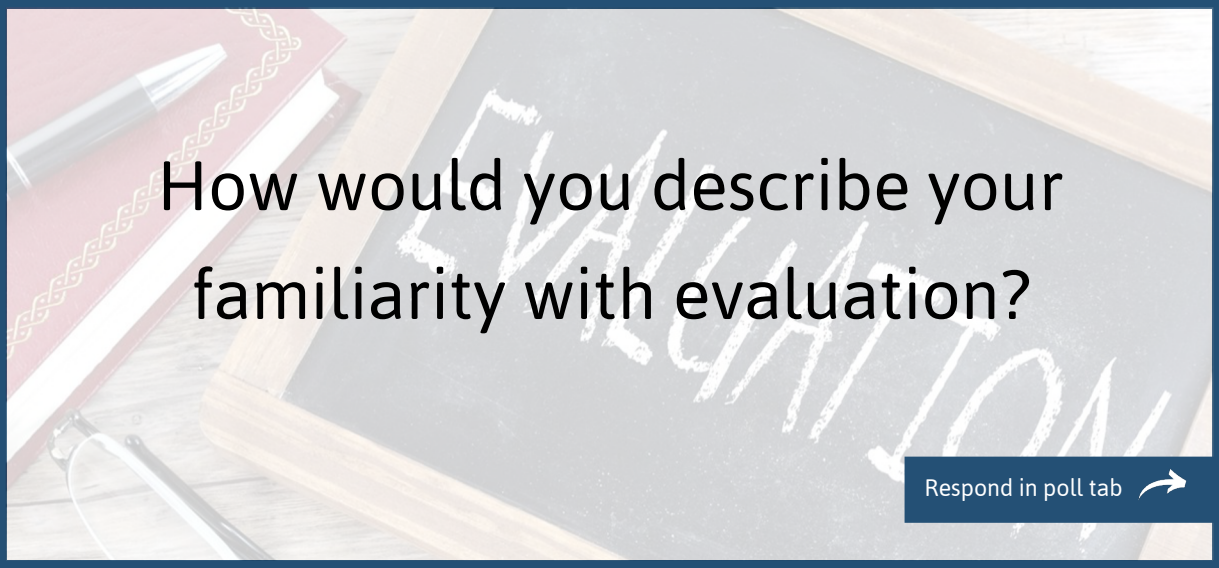
Where does it go in a proposal?

What will happen?

QUESTION BREAK

## ONE WORD

# POLL QUESTION

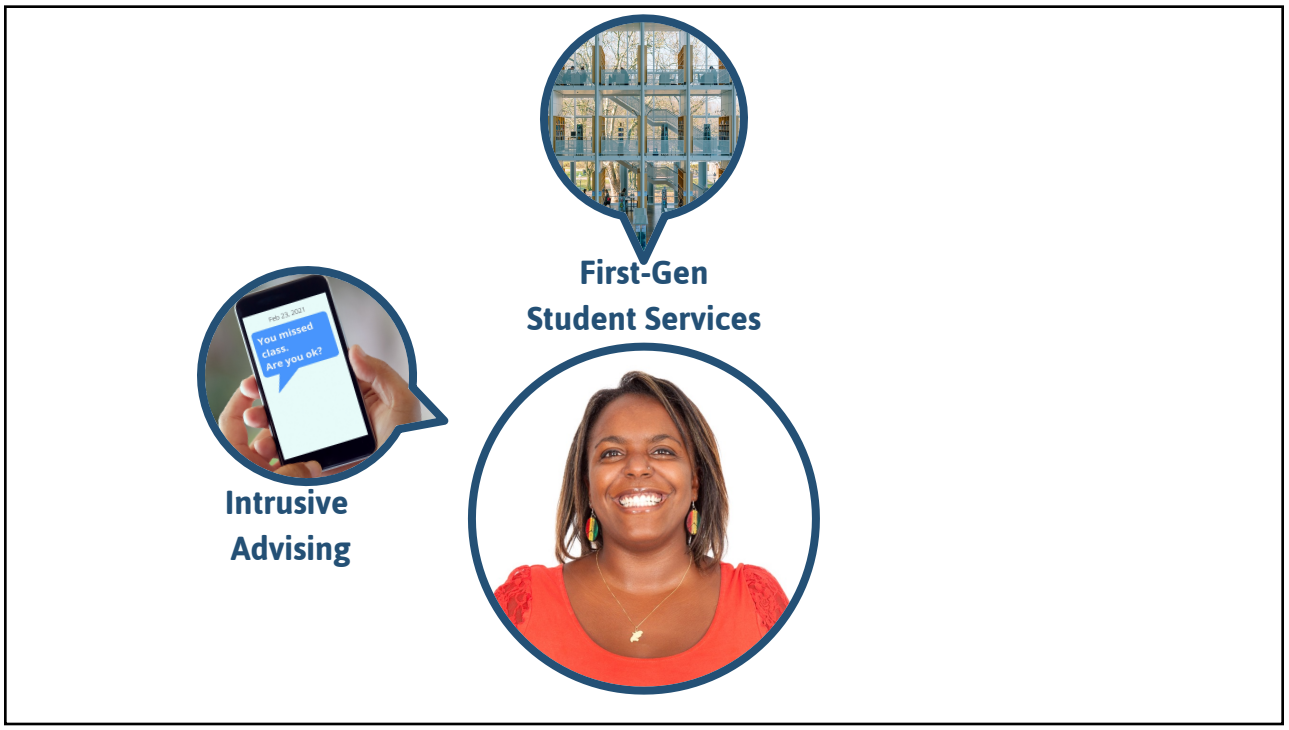


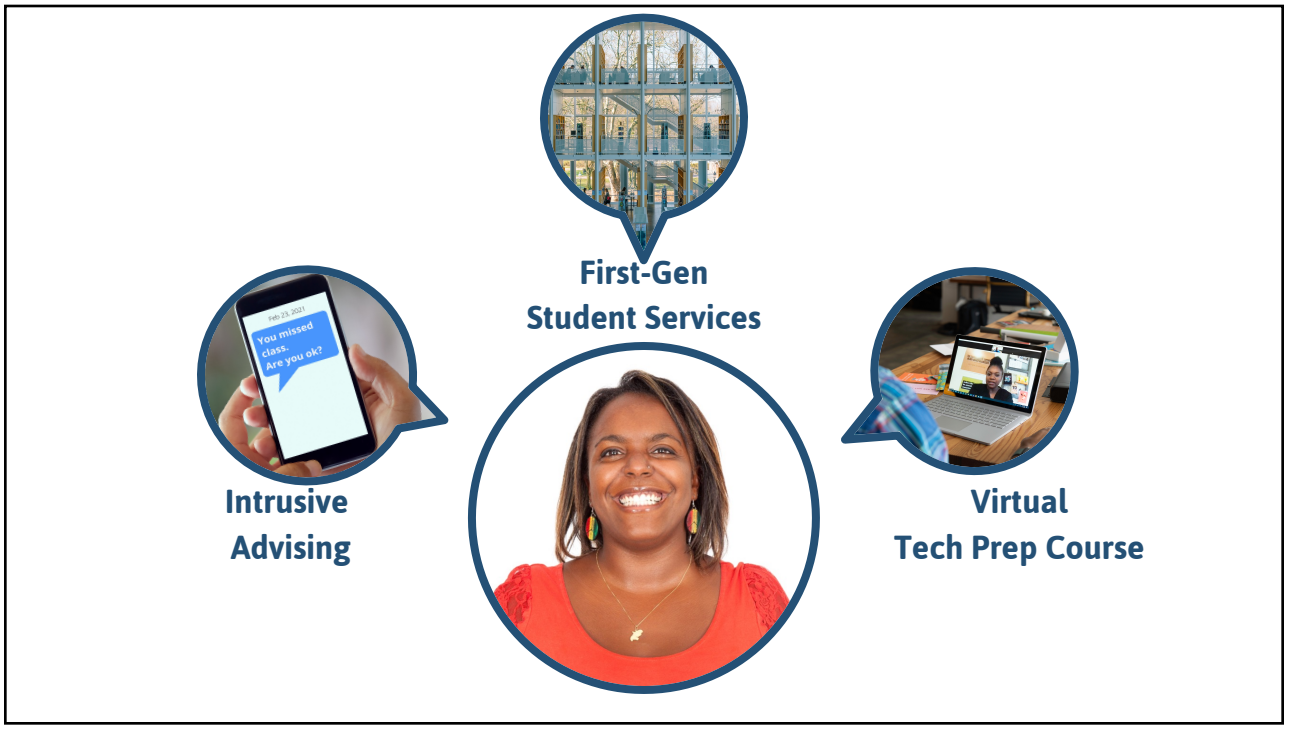

## Meet Jen Genericson*

She has a GREAT idea for an ATE proposal

*This is a fictional character and project.
Any resemblance to actual persons or projects is coincidental.

**Intrusive Advising**


First-Gen
Student Services
You missed class. Are you ok?
Intrusive
Advising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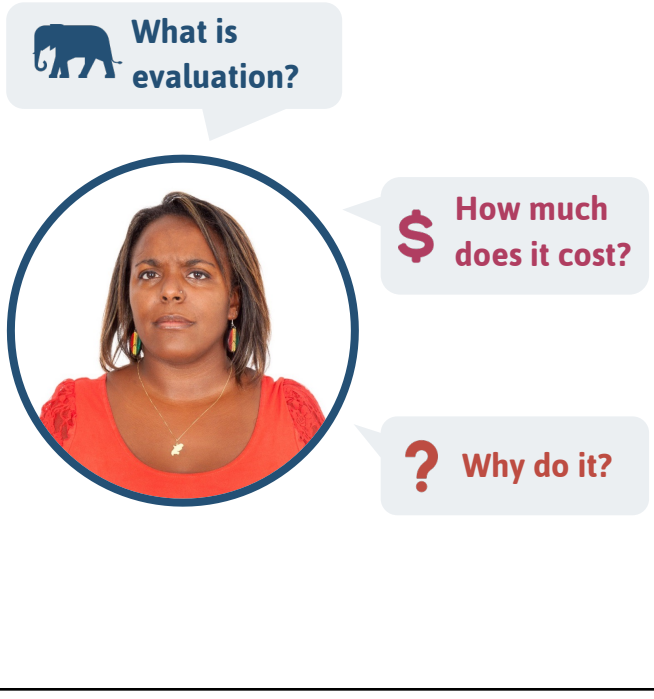
Advising
Virtual
Tech Prep Course

**EVALUATION: All projects and centers carry out evaluative activities.** The funds to support an evaluator independent of the project or center must be requested, and the requested funds must match the scope of the proposed evaluative activities.

**What is evaluation?**

What is evaluation?
How much does it cost?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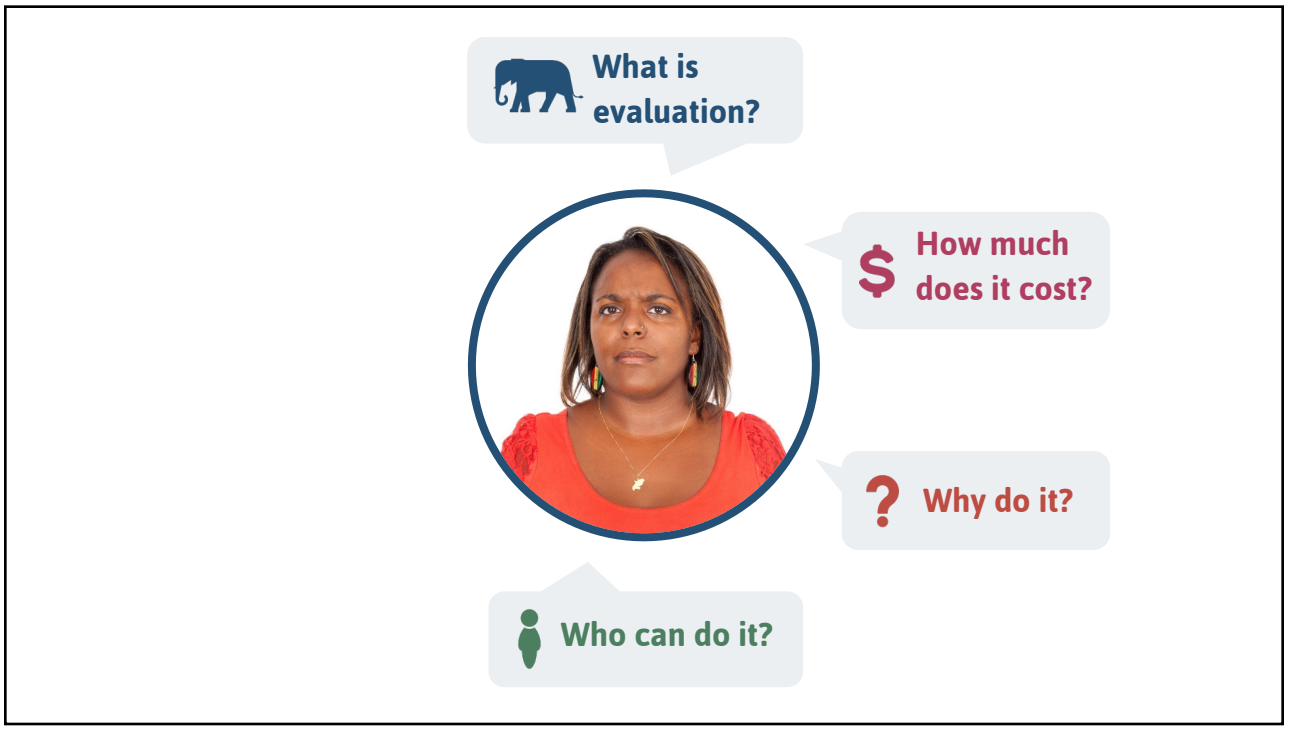
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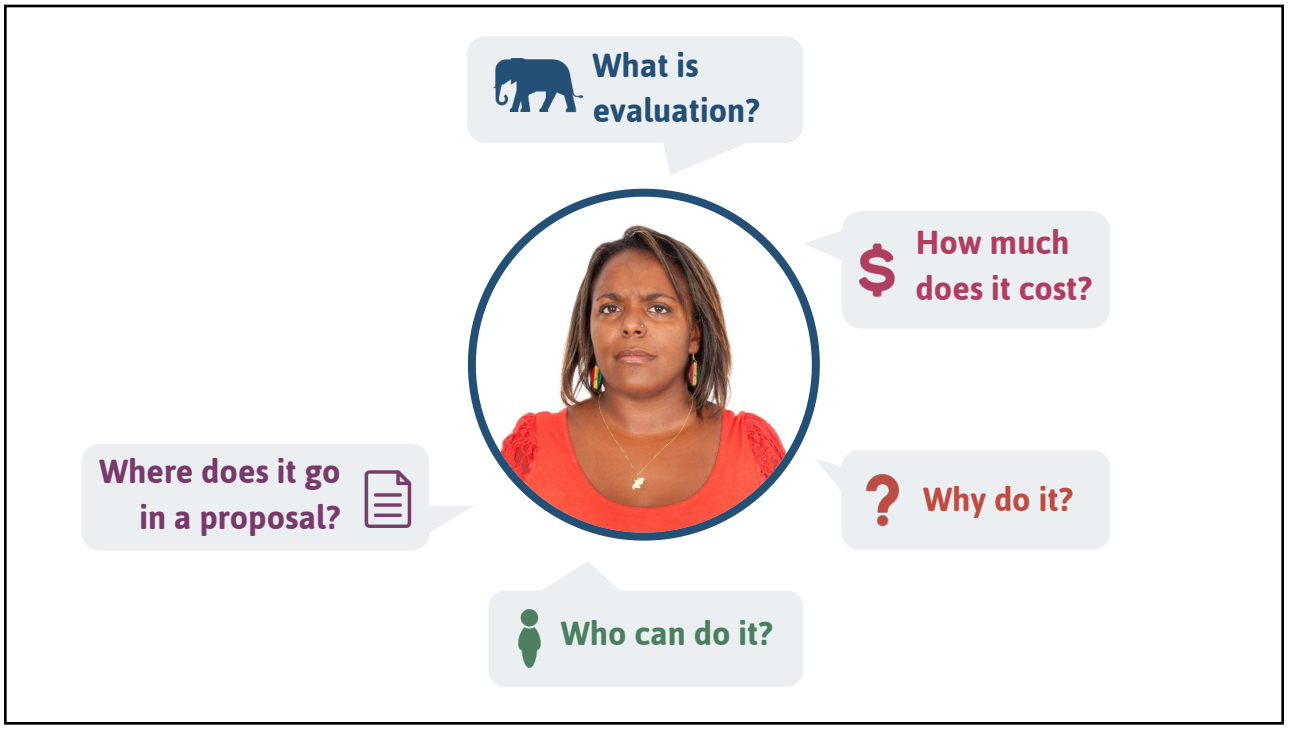
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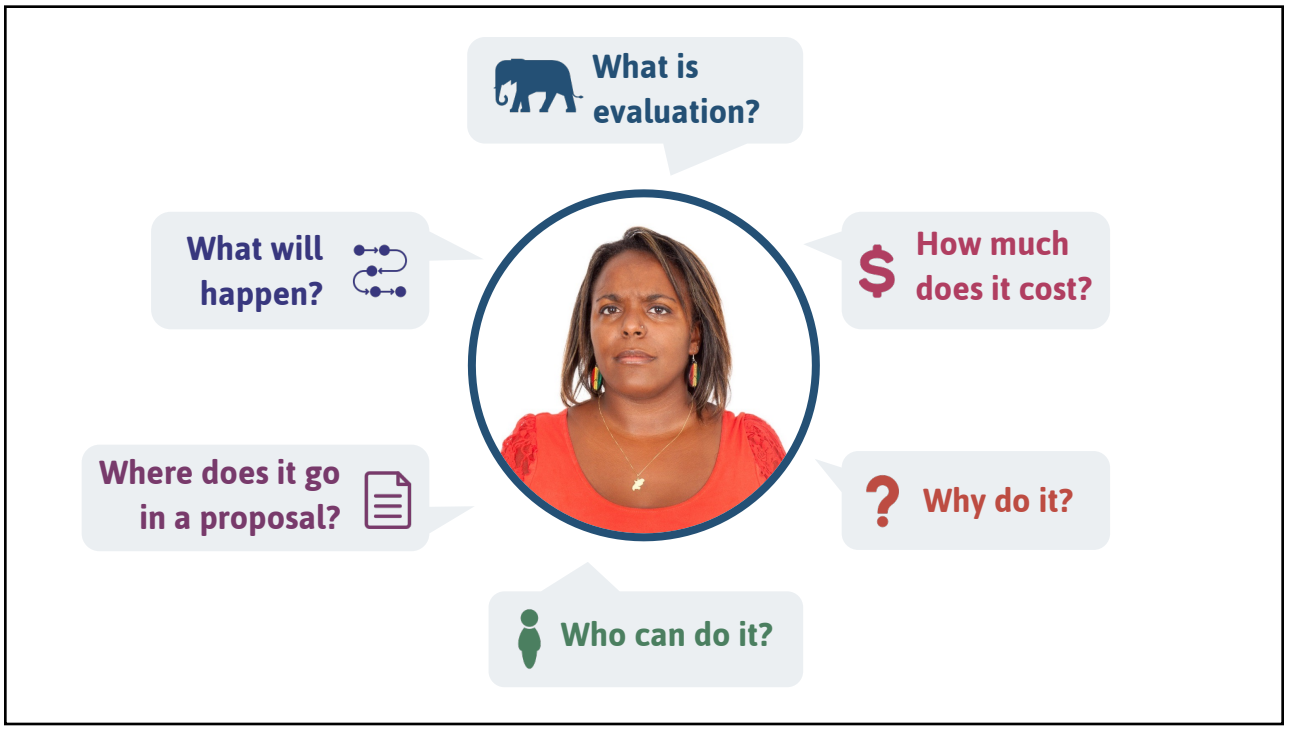
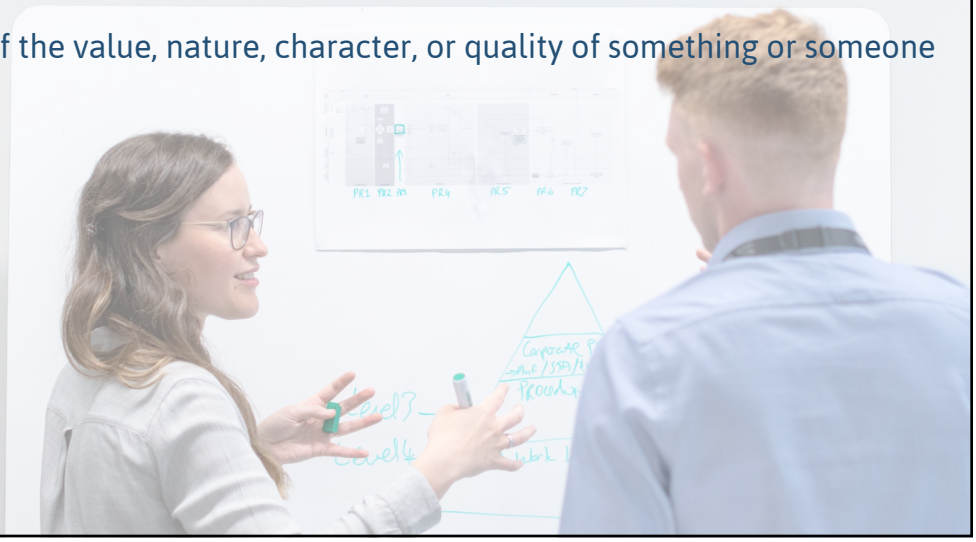

What is evaluation?
What will happen?
How much does it cost?
Where does it go in a proposal?
Why do it?
Who can do it?

What is Evaluation?

# What is Evaluation?

**e·val·u·a·tion**

: determination of the value, nature, character, or quality of something or someone



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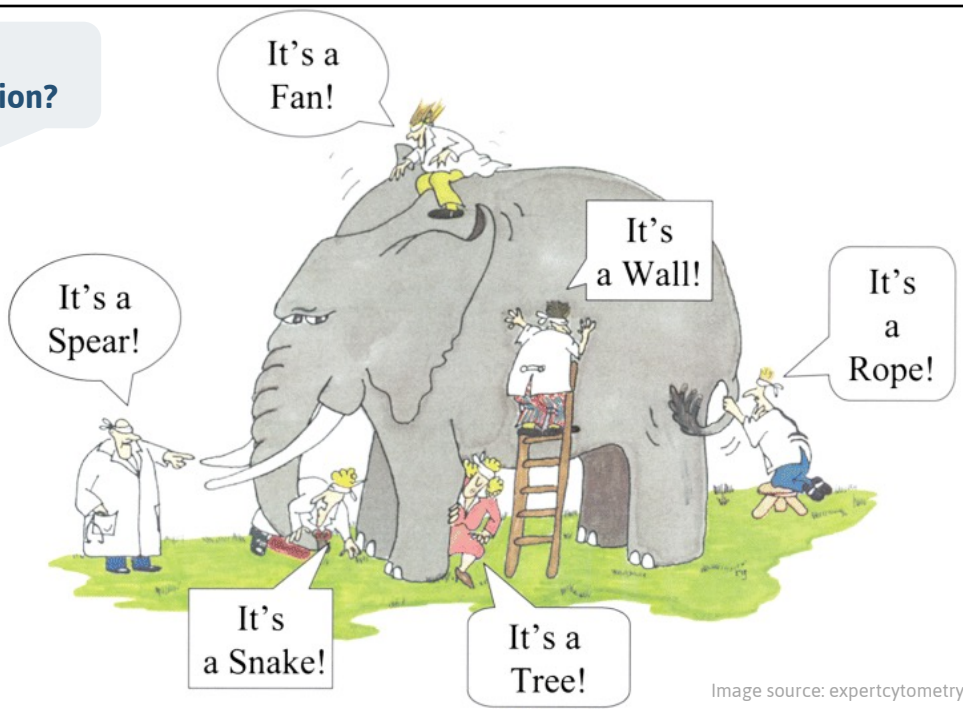
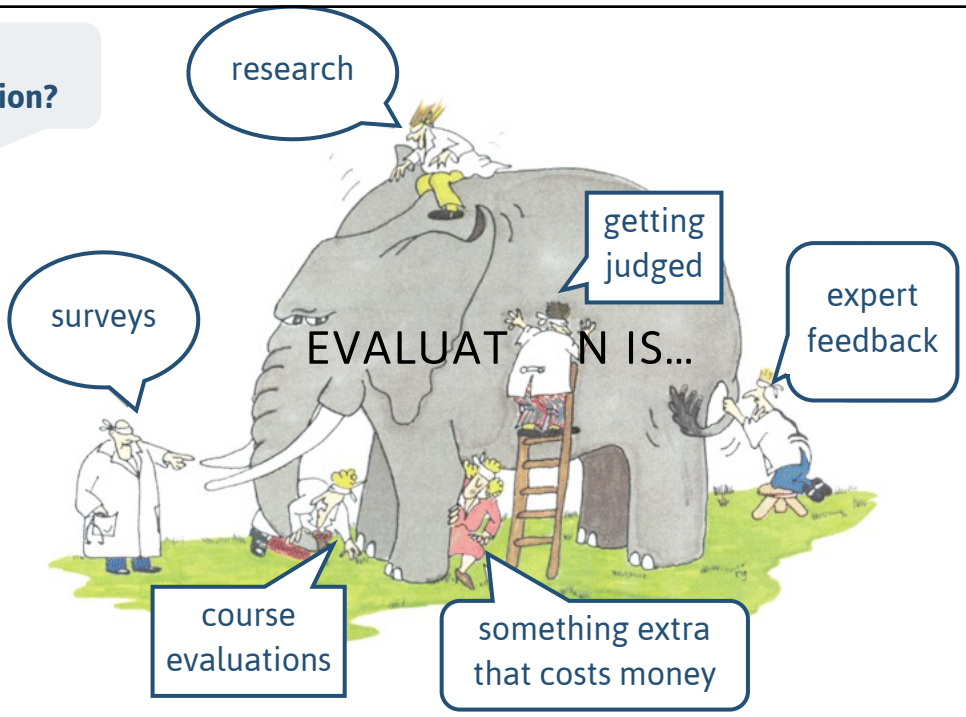



Image source: expertcytometry.com

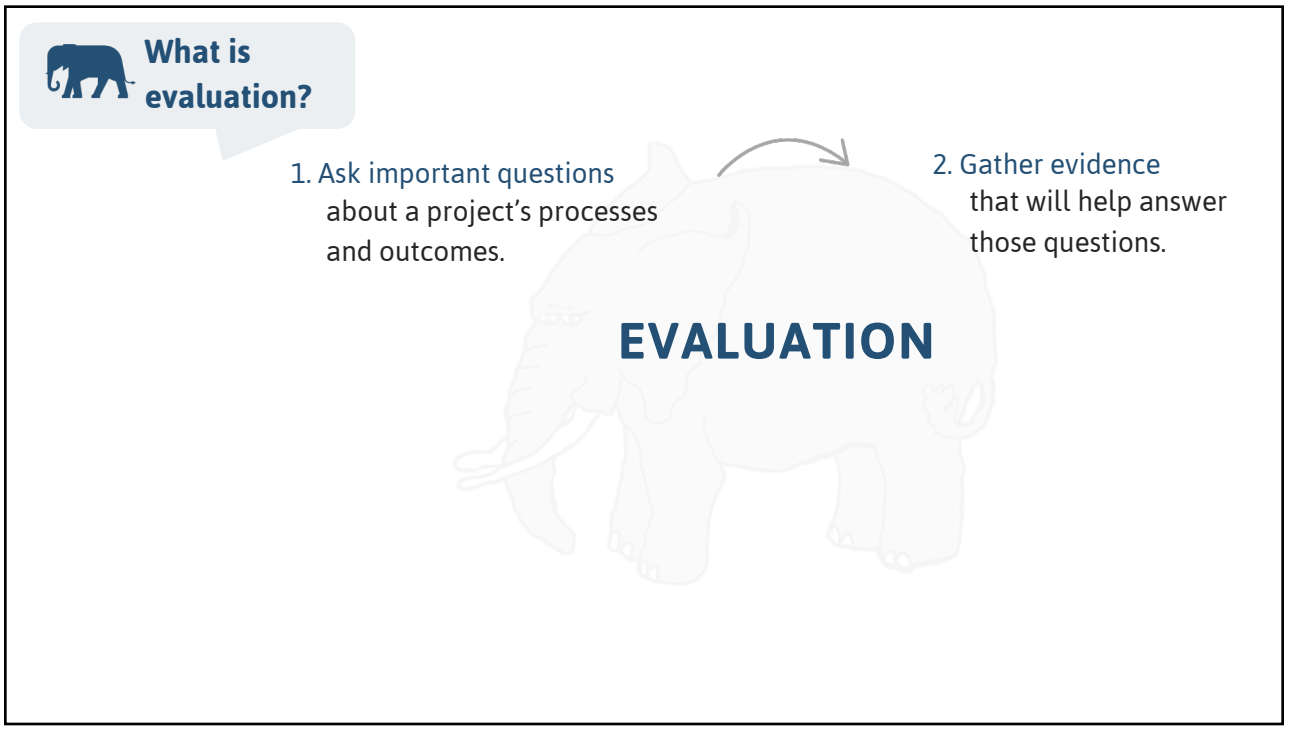
## What is evaluation?




## What is evaluation?

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

**EVALUATION**


What is evaluation?
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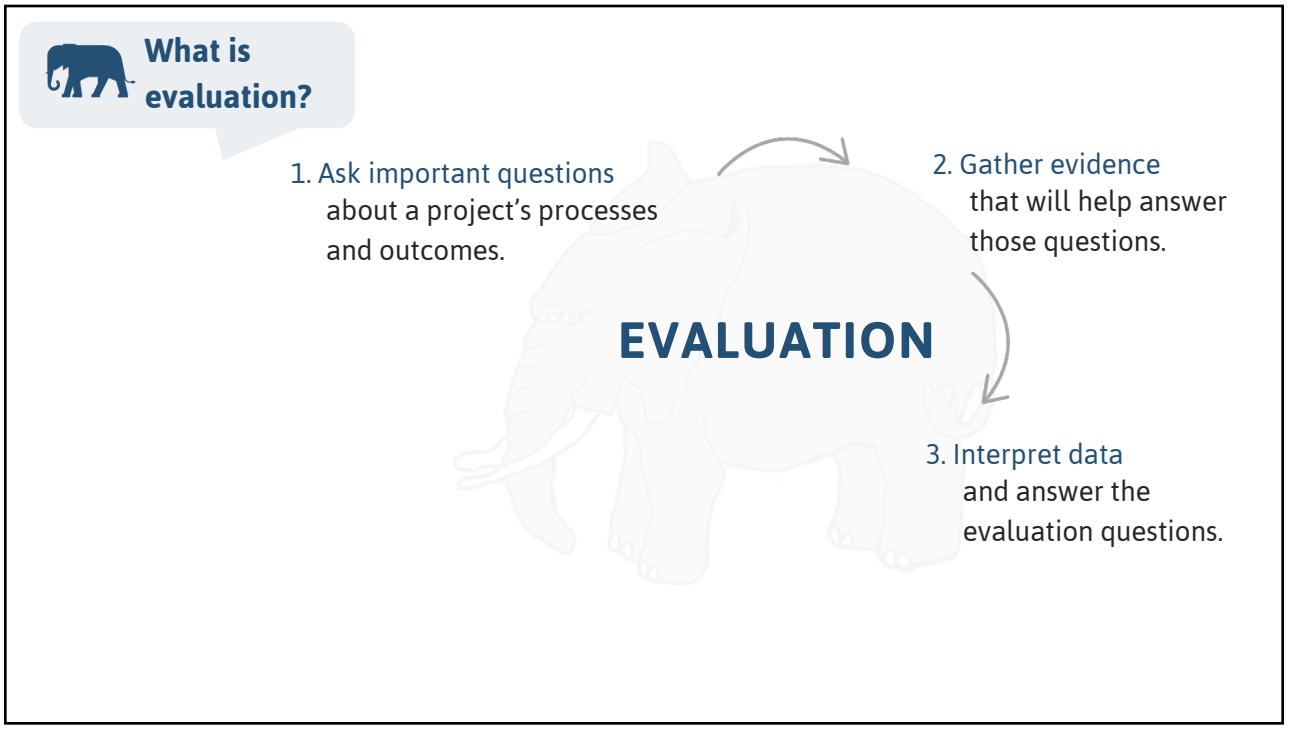
2. Gather evidence that will help answer those questions.
EVALUATION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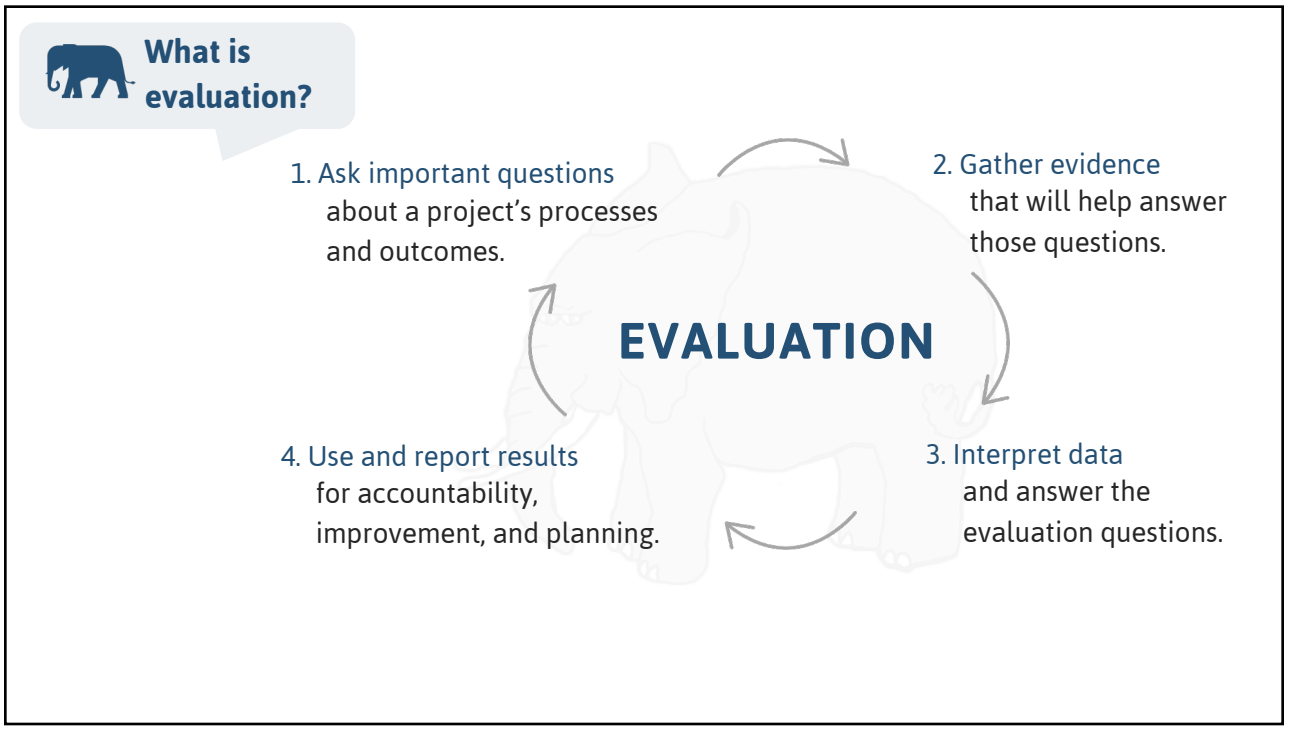
EVALUATION
3. Interpret data and answer the evaluation questions.


What is evaluation?
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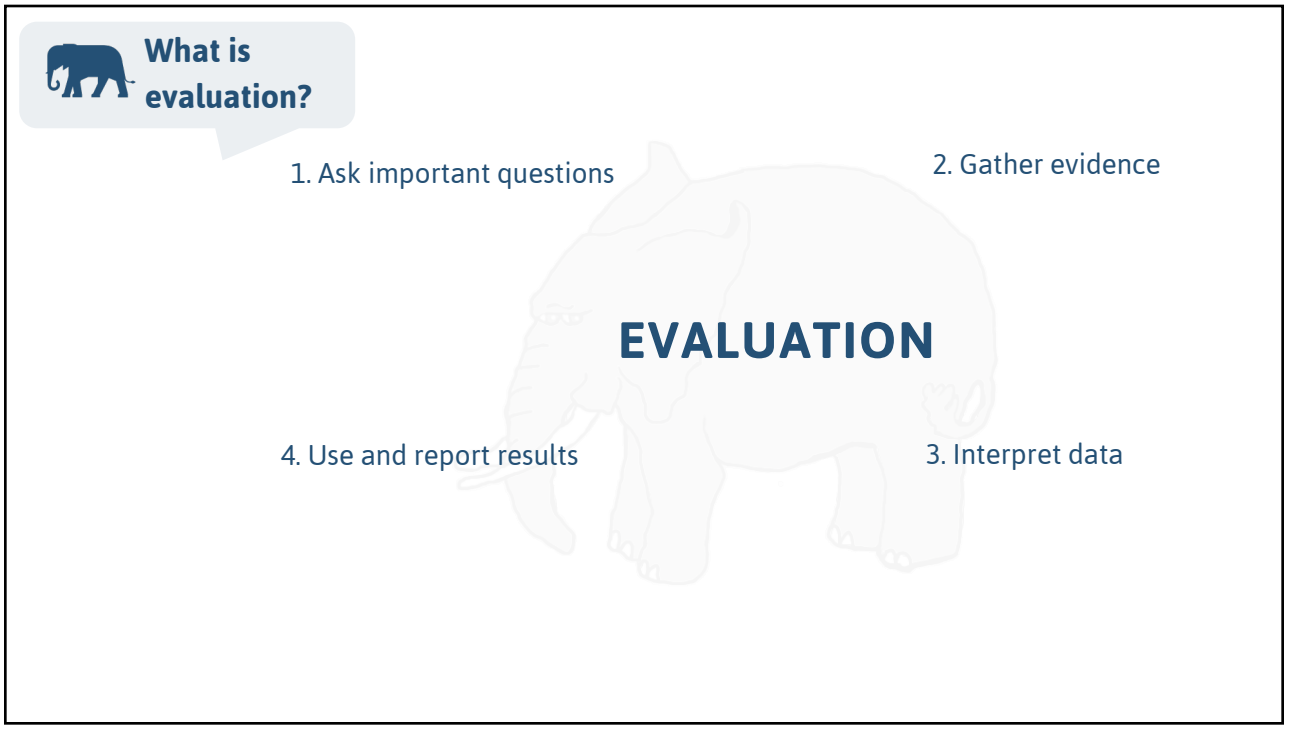
2. Gather evidence that will help answer those questions.
EVALUATION
3. Interpret data and answer the evaluation questions.
4. Use and report results for accountability, improvement, and planning.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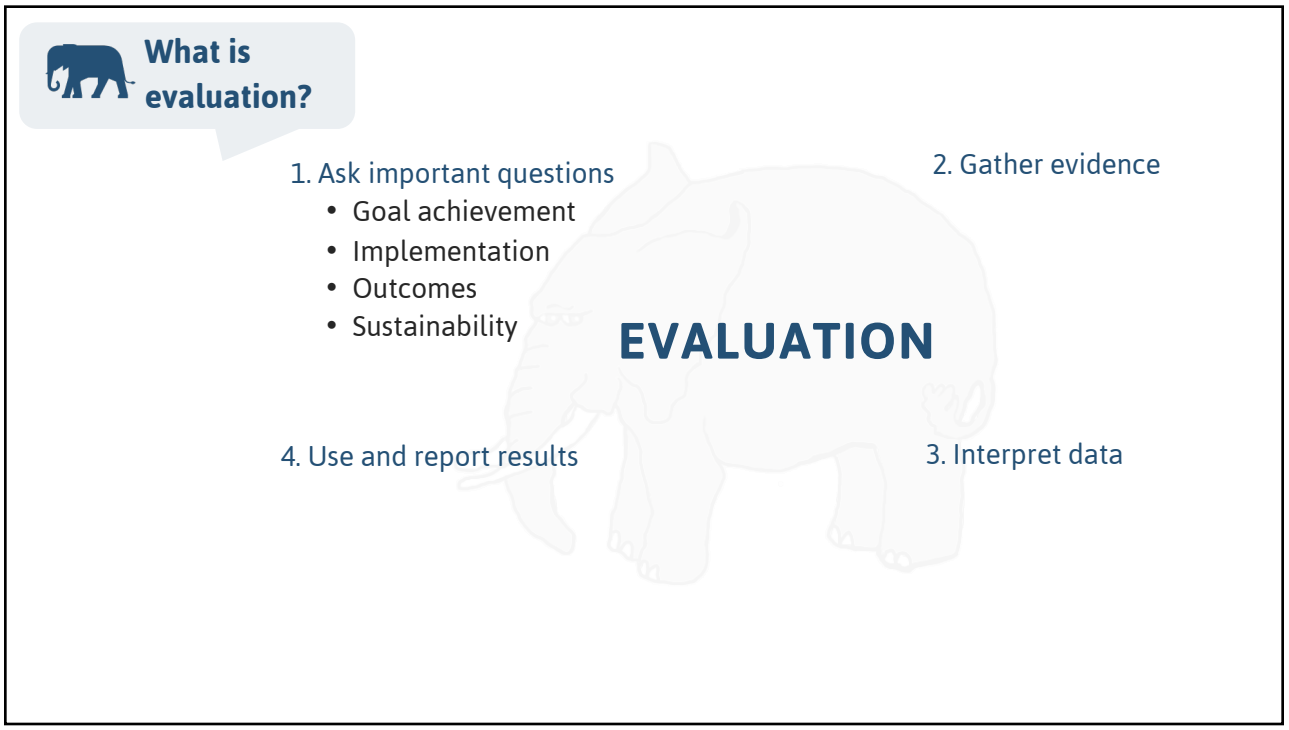
EVALUATION
4. Use and report results
3. Interpret data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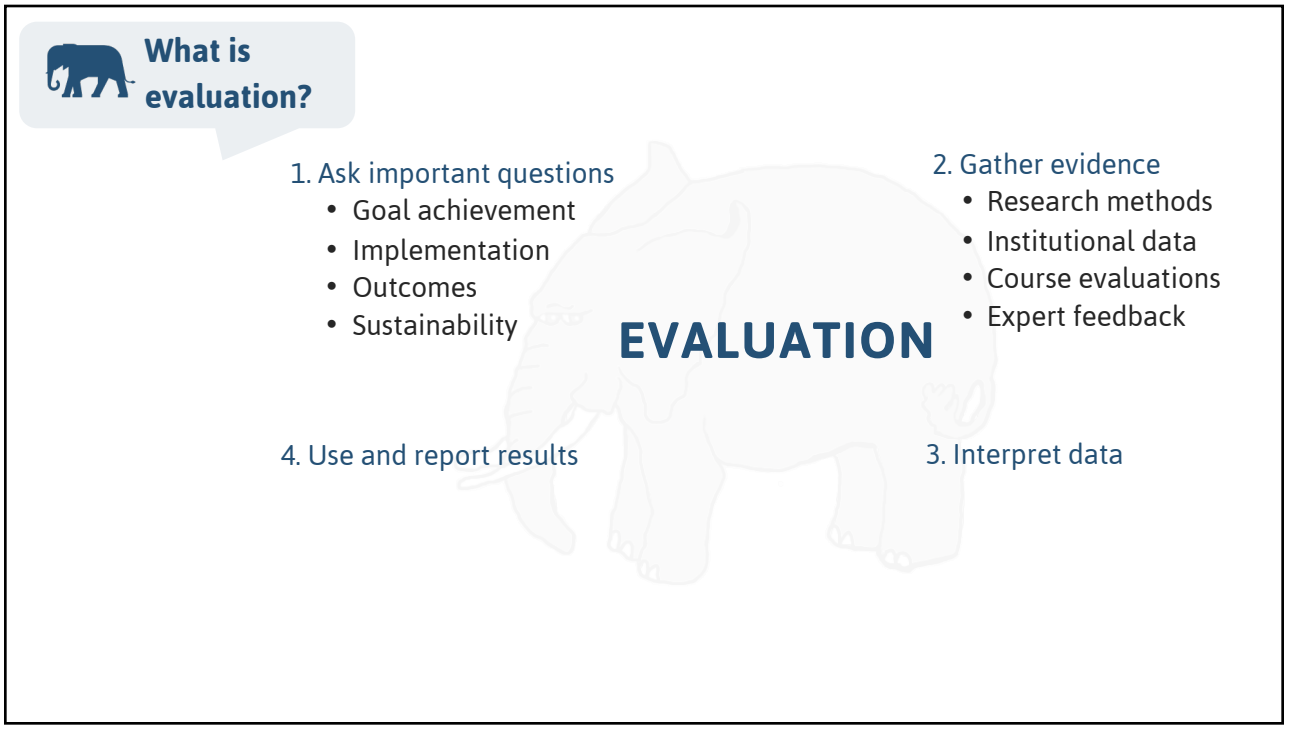
3. Interpret data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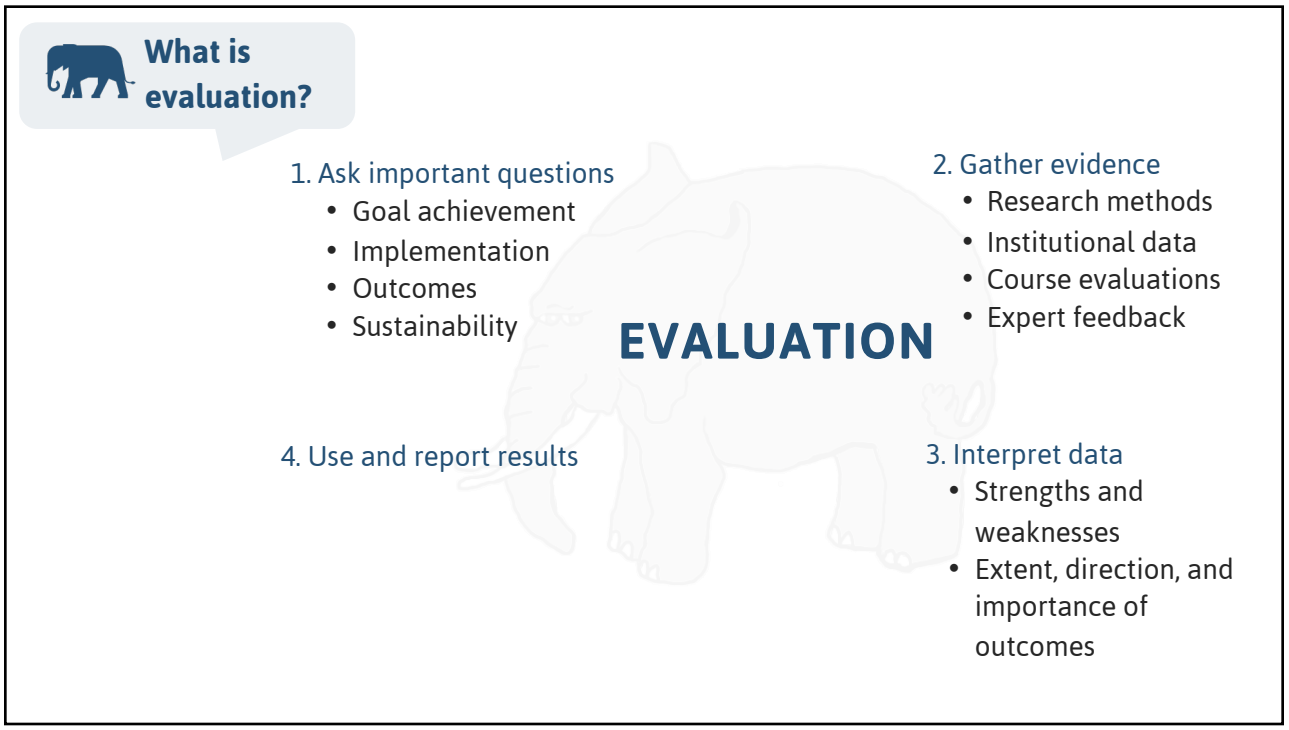
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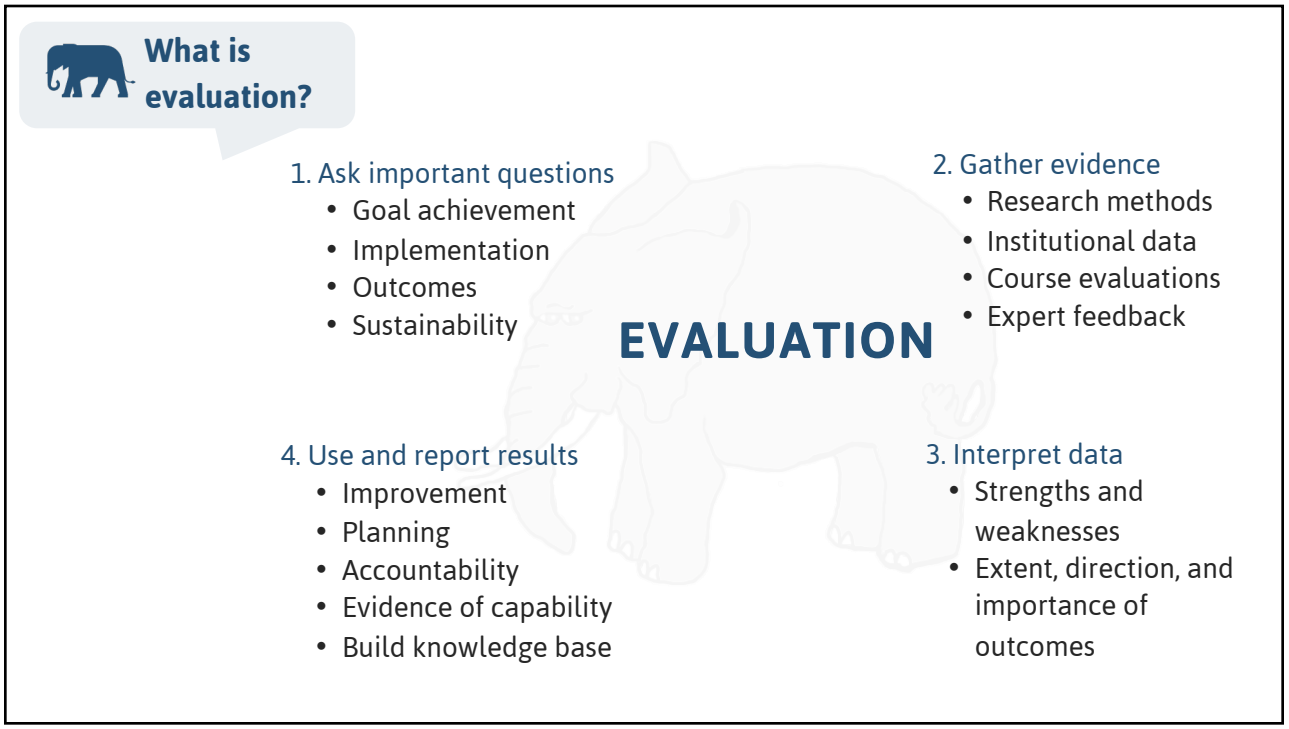
EVALUATION
4. Use and report results
3. Interpret data
• Strengths and weaknesses
• Extent, direction, and importance of outcomes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2. Gather evidence
• Research methods
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• Course evaluations
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EVALUATION
4. Use and report results
• Improvement
• Planning
• Accountability
• Evidence of capability
• Build knowledge base
3. Interpret data
• Strengths and weaknesses
• Extent, direction, and importance of outcomes

## CHAT QUESTION

In one word, how are you feeling right now?

Answer in chat

## What is evaluation?

1. Ask important questions
2. Gather evidence
3. Interpret data
4. Use and report results

## What is evaluation?

1. Ask important questions
2. Gather evidence
3. Interpret data
4. Use and report results

## What is evaluation?

ACTIVITIES → SHORT-TERM OUTCOMES → MID-TERM OUTCOMES → LONG-TERM OUTCOMES

## What is evaluation?

### PROJECT LOGIC MODEL

| ACTIVITIES | SHORT-TERM OUTCOMES | MID-TERM OUTCOMES | LONG-TERM OUTCOMES |
|---|---|---|---|
| Develop and implement virtual Tech Prep course | | | |
| Develop first-generation student support resources | | | |
| Develop and implement intrusive advising strategies | | | |

## What is evaluation?

### PROJECT LOGIC MODEL

| ACTIVITIES | SHORT-TERM OUTCOMES | MID-TERM OUTCOMES | LONG-TERM OUTCOMES |
|---|---|---|---|
| Develop and implement virtual Tech Prep course | | | Graduates transfer to STEM programs at four-year colleges |
| Develop first-generation student support resources | | | Graduates enter technical workforce |
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## What is evaluation?

### PROJECT LOGIC MODEL

| ACTIVITIES | SHORT-TERM OUTCOMES | MID-TERM OUTCOMES | LONG-TERM OUTCOMES |
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| Develop and implement virtual Tech Prep course | Pass rate for technical courses increases | | Graduates transfer to STEM programs at four-year colleges |
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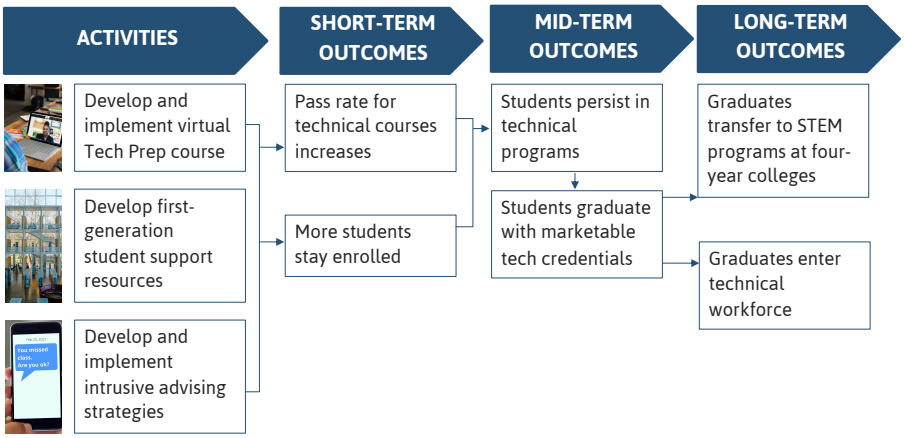
## What is evaluation?

### PROJECT LOGIC MODEL

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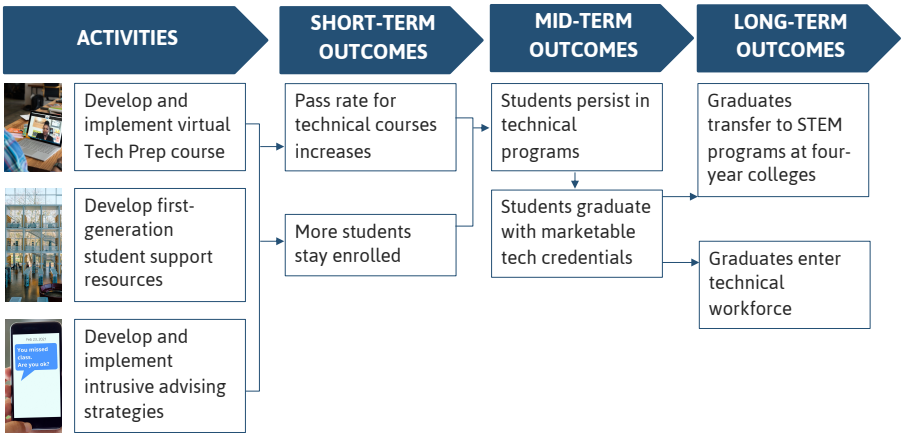


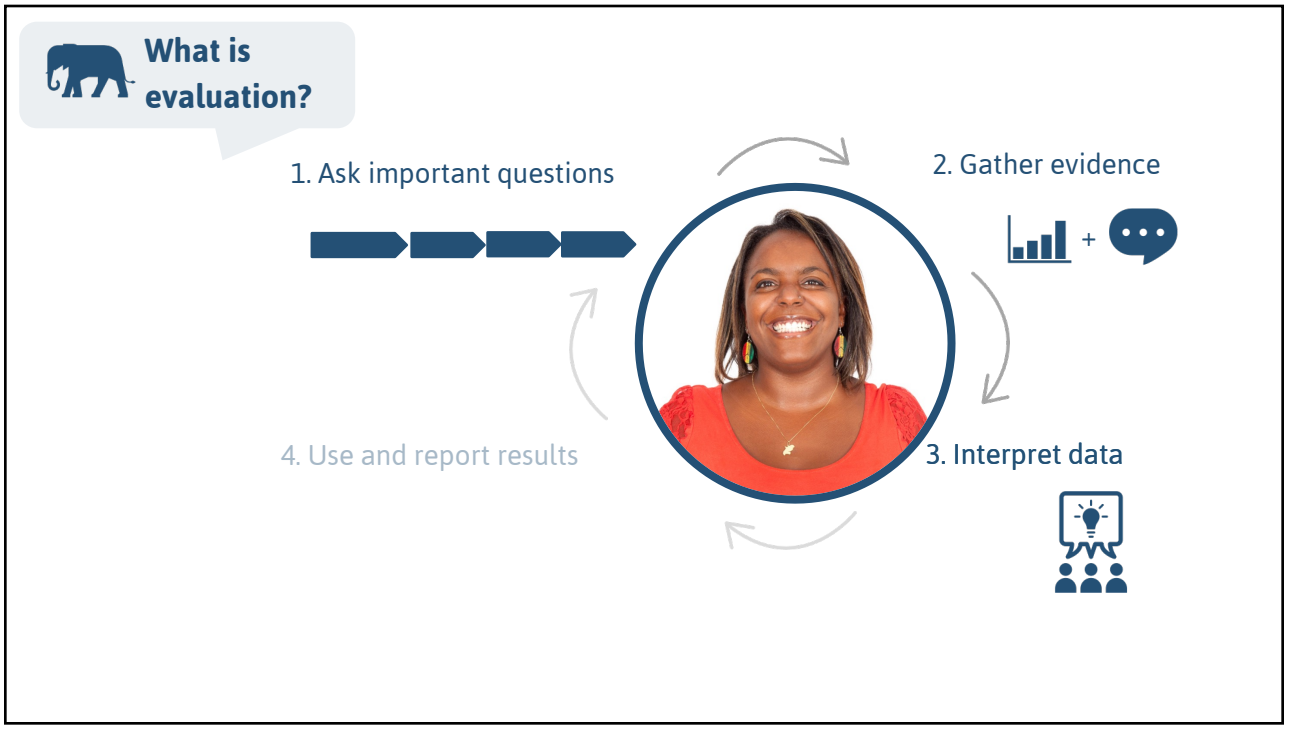
# CHAT QUESTION

**PROJECT LOGIC MODEL**

| ACTIVITIES | SHORT-TERM OUTCOMES | MID-TERM OUTCOMES | LONG-TERM OUTCOMES |
|---|---|---|---|
| Develop and implement virtual Tech Prep course | Pass rate for technical courses increases | Students persist in technical programs | Graduates transfer to STEM programs at four-year colleges |
| Develop first-generation student support resources | More students stay enrolled | Students graduate with marketable tech credentials | Graduates enter technical workforce |
| Develop and implement intrusive advising strategies | | | |

Answer in chat

What is evaluation?
1. Ask important questions
2. Gather evidence
3. Interpret data
4. Use and report results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## What is evaluation?

**PROJECT LOGIC MODEL**

**ACTIVITIES**

Develop and implement virtual Tech Prep course

Develop first-generation student support resources

Develop and implement intrusive advising strategies

## EVALUATION QUESTIONS

1. To what extent are the virtual Tech Prep course, first-generation student resources, and intrusive advising meeting the needs of students?

## What is evaluation?

**SHORT-TERM OUTCOMES**

Pass rate for technical courses increases

More students stay enrolled

### EVALUATION QUESTIONS

2. To what extent and how is the project impacting students' success in technical courses?
3. To what extent and how is the project impacting students' ability to navigate college and stay enrolled?

55

## What is evaluation?

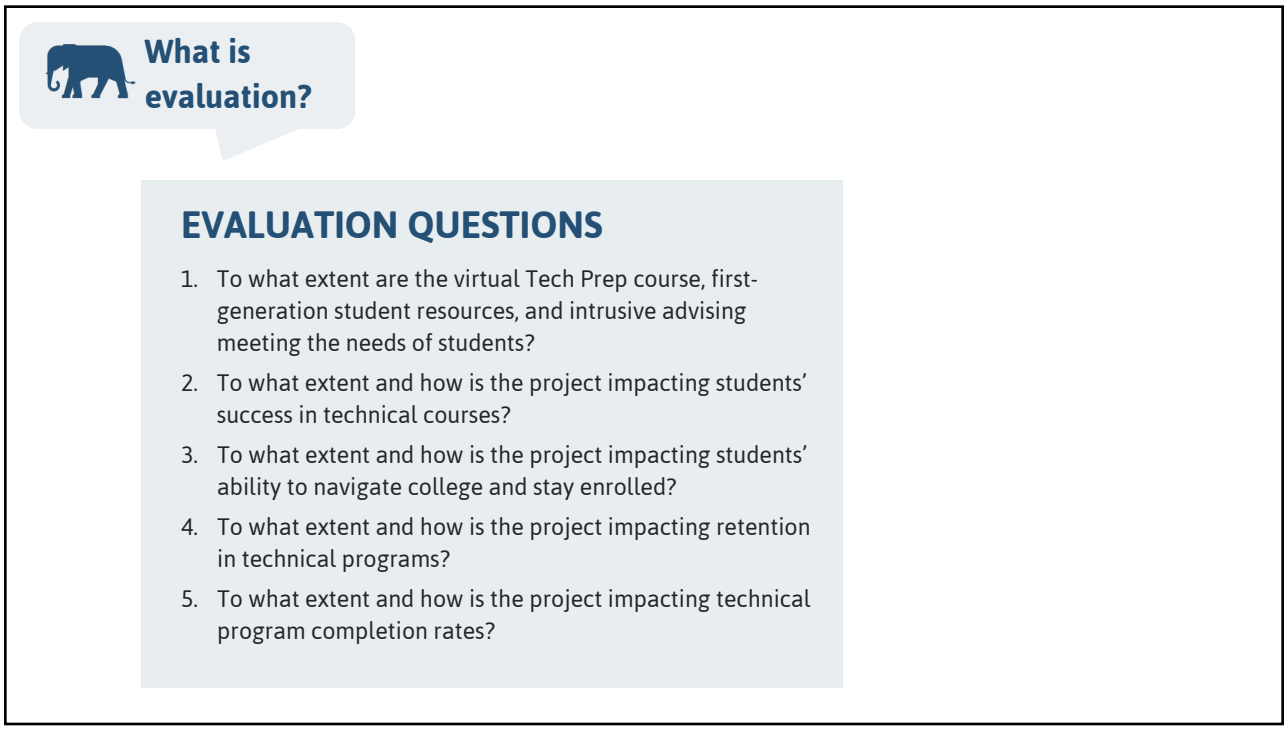
### EVALUATION QUESTIONS

4. To what extent and how is the project impacting retention in technical programs?
5. To what extent and how is the project impacting technical program completion rates?

**MID-TERM OUTCOMES**

Students persist in technical programs

Students graduate with marketable tech credentials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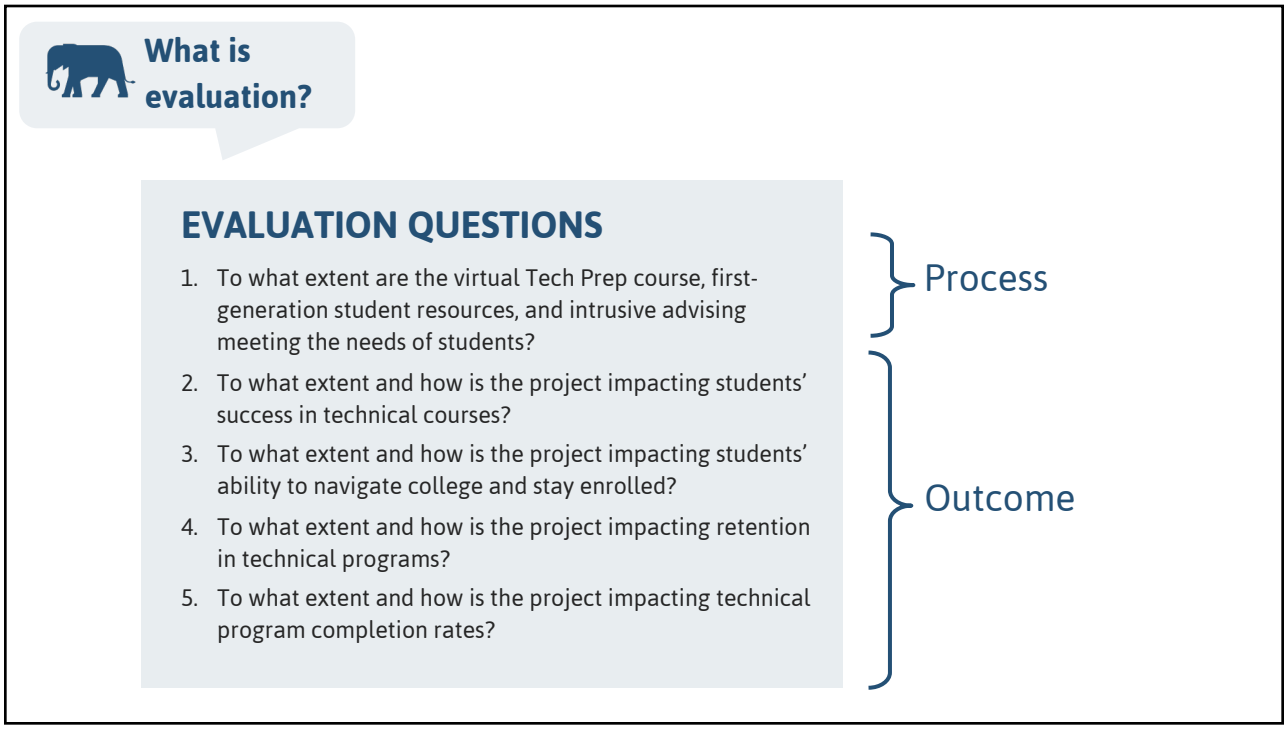
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Process
Outcome

## What is evaluation?

### EVALUATION QUESTIONS

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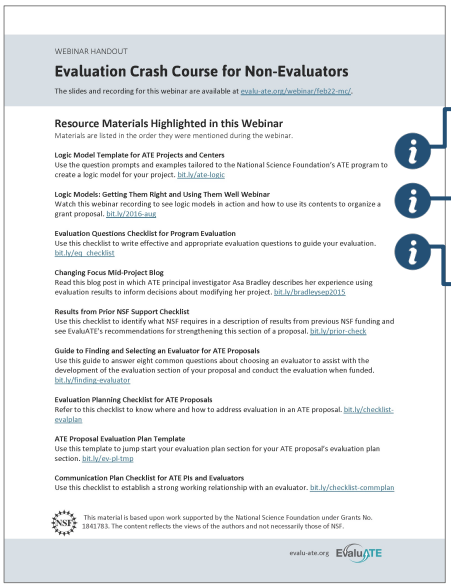
Process

Outcome

+

## What is evaluation?



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### RESOURCES

- Logic Model Template for ATE Projects and Centers
- Logic Models: Getting Them Right and Using Them Well
- Evaluation Questions Checklist for Program Evaluation

# QUESTIONS

PUT IN CHAT BOX

**$ How much does it cost?**

**EVALUATION:** All projects and centers carry out evaluative activities. The funds to support an evaluator independent of the project or center must be requested, and **the requested funds must match the scope of the proposed evaluative activities.**

## $ How much does it cost?

**Evaluation Budgeting Rule of Thumb:**

Dedicate

**10%**

of direct project costs to evaluation

## $ How much does it cost?

$ ←——————————→ $$$

Process questions — Long-term outcomes

## $ How much does it cost?

| $ | $$$ |
|---|---|
| Process questions | Long-term outcomes |
| Existing data | New data |

## $ How much does it cost?

| $ | $$$ |
|---|---|
| Process questions | Long-term outcomes |
| Existing data | New data |
| Quantitative data | Qualitative data |

**How much does it cost?**

$ ←→ $$$

| | |
|---|---|
| Process questions | Long-term outcomes |
| Existing data | New data |
| Quantitative data | Qualitative data |
| Less responsive | More responsive |

**How much does it cost?**

$ ←→ $$$

| | |
|---|---|
| Process questions | Long-term outcomes |
| Existing data | New data |
| Quantitative data | Qualitative data |
| Less responsive | More responsive |
| Less involvement | More involvement |

## How much does it cost?

$ ←→ $$$

| | |
|---|---|
| Process questions | Long-term outcomes |
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| Quantitative data | Qualitative data |
| Less responsive | More responsive |
| Less involvement | More involvement |
| More internal evaluation | Less internal evaluation |

## How much does it cost?

$ ←→ $$$

| | |
|---|---|
| Process questions | Long-term outcomes |
| Existing data | New data |
| Quantitative data | Qualitative data |
| Less responsive | More responsive |
| Less involvement | More involvement |
| More internal evaluation | Less internal evaluation |
| Less travel | More travel |

## How much does it cost?

$ ←→ $$$

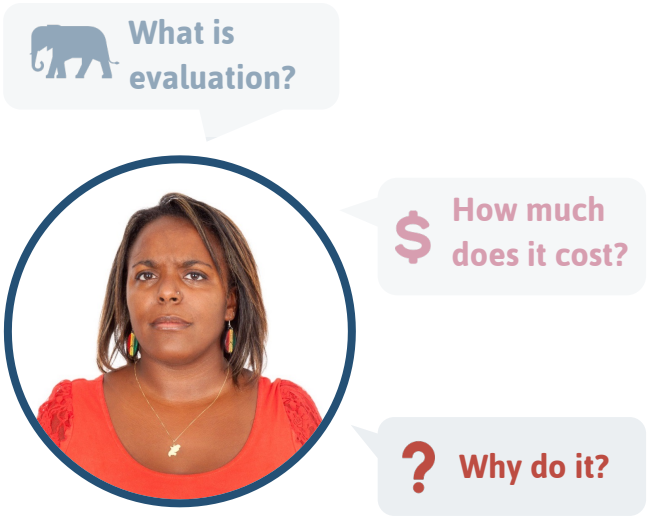
| | |
|---|---|
| Process questions | Long-term outcomes |
| Existing data | New data |
| Quantitative data | Qualitative data |
| Less responsive | More responsive |
| Less involvement | More involvement |
| More internal evaluation | Less internal evaluation |
| Less travel | More travel |
| … | … |

## How much does it cost?

Total Project Budget:
$225,000 over 3 years

**10% EVALUATION BUDGET:**
$22,500 total
$ 7,500 per year

- Evaluator's time
- Travel costs for site visits
- Evaluator's overhead costs

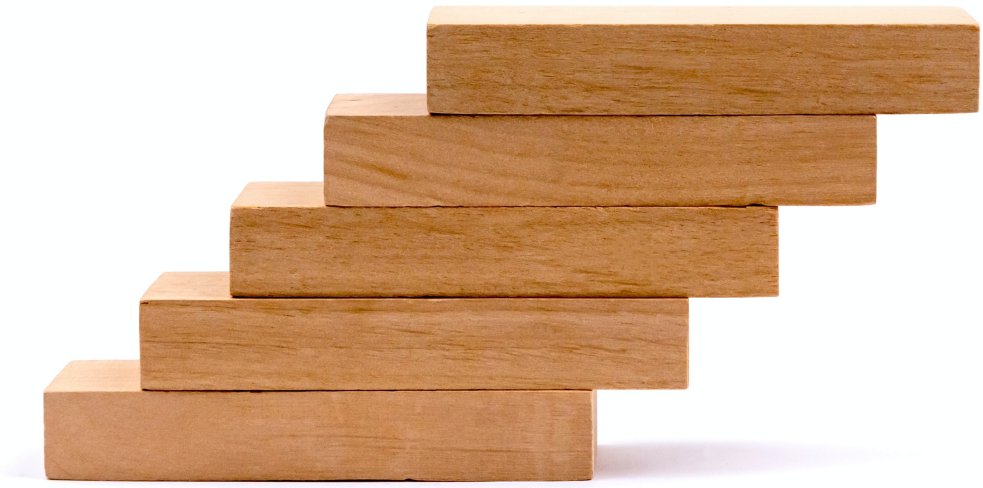

What is evaluation?
How much does it cost?
Why do it?

Why do it?
NSF
**EVALUATION:** All projects and centers carry out evaluative activities. **The funds to support an evaluator independent of the project or center must be requested** and the requested funds must match the scope of the proposed evaluative activities.
INDEPENDENT EVALUATION IS
REQUIRED

WHY EVALUATE?

WHY EVALUATE?
1 Improvement
2 Accountability
3 Evidence

## 1 Improvement



## Why do it?

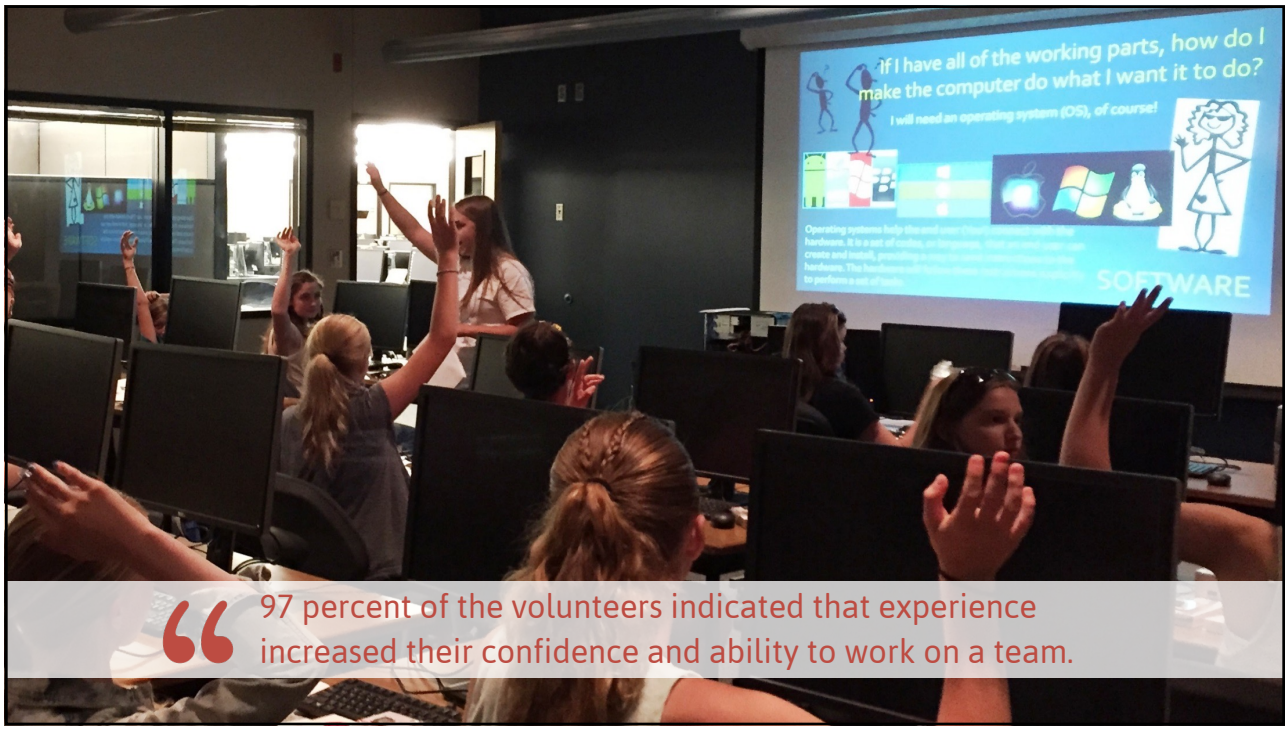
## 1 Improvement

**PROJECT LOGIC MODEL**

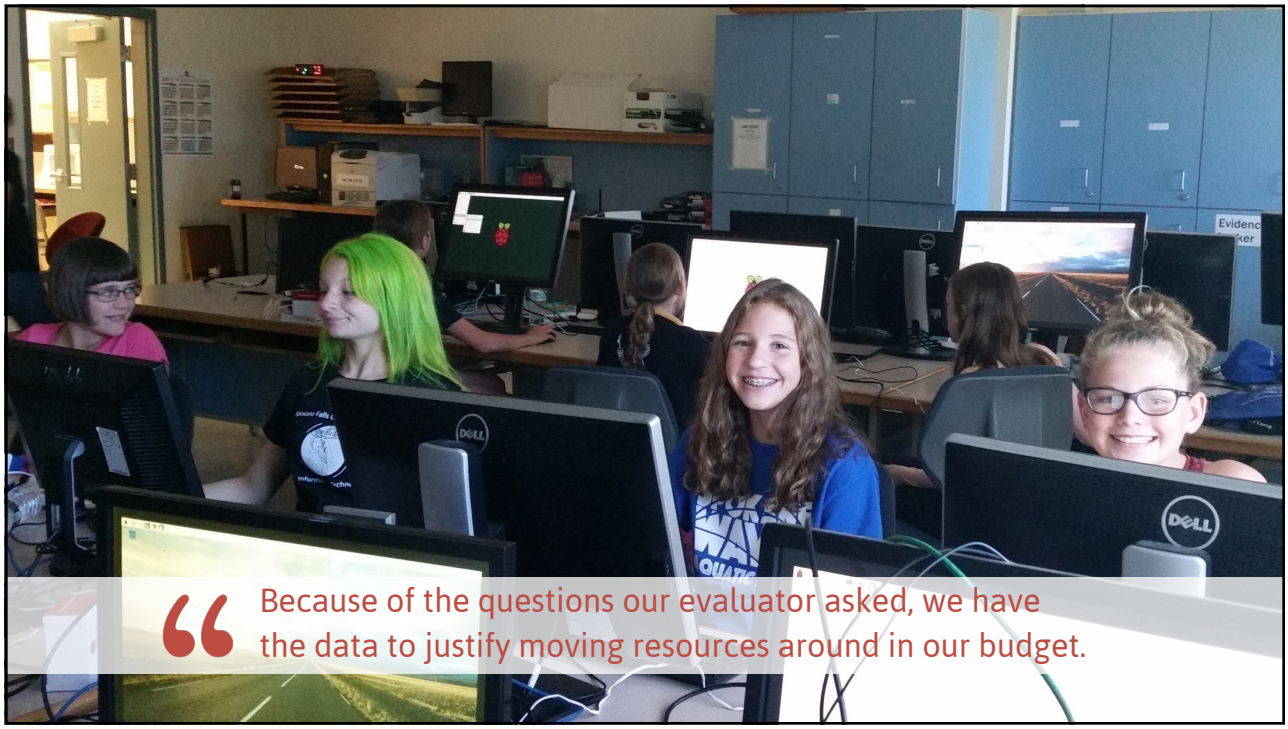
| ACTIVITIES | SHORT-TERM OUTCOMES | MID-TERM OUTCOMES | LONG-TERM OUTCOMES |
|---|---|---|---|
| Develop and implement virtual Tech Prep course | Pass rate for technical courses increases | Students persist in technical programs | Graduates transfer to STEM programs at four-year colleges |
| Develop first-generation student support resources | More students stay enrolled | Students graduate with marketable tech credentials | Graduates enter technical workforce |
| Develop and implement intrusive advising strategies | | | |

## Rebranding the 21st Century IT Technician

**Asa Bradley**
Spokane Community College




> 97 percent of the volunteers indicated that experience increased their confidence and ability to work on a team.



> Because of the questions our evaluator asked, we have the data to justify moving resources around in our budget.

? Why do it?

2 Accountability

Annual reports submitted by principal investigators to NSF:

Research.gov ONLINE GRANTS MANAGEMENT FOR THE NSF COMMUNITY

Cover | Accomplishments | Products | Participants/Organizations | Impacts | Changes/Problems | Special Requirements

Why do it?

## 2 Accountability

Annual reports submitted by principal investigators to NSF:

- Report on goals, activities, objectives, results, outcomes
- Upload evaluation report

Why do it?

2 Accountability

Annual reports submitted by principal investigators to NSF:

- Report on goals, activities, objectives, results, outcomes
- Upload evaluation report

- Use data to justify change in project plans

# POLL QUESTION

**Which is the best evidence of outcomes?**

## Example A

The prior project was funded to increase the number of students completing technical degrees and transferring to 4-year STEM programs. Funded activities included developing a Tech Prep course, enhancing advising, and developing support resources and strategies for first-generation college students.

## Example B

All project objectives were achieved: 150 students enrolled in the new Tech Prep course. 300 first-generation students benefited from newly developed resources aimed at addressing their diverse needs. 25 faculty members were trained in intrusive advising and reported using proactive advising strategies.

## Example C

The 5-year average pass rate for technical courses increased from 62% to 85%. Year-to-year persistence in technical programs increased from 45% to 66%. Students said that personal guidance from faculty and peer advisors was essential to helping them overcome challenges they faced while pursuing their education.

Respond in poll tab

## Why do it?

### Example A
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### Example B
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The 5-year average pass rate for technical courses increased from 62% to 85%. Year-to-year persistence in technical programs increased from 45% to 66%. Students said that personal guidance from faculty and peer advisors was essential to helping them overcome challenges they faced while pursuing their education.

## Why do it?

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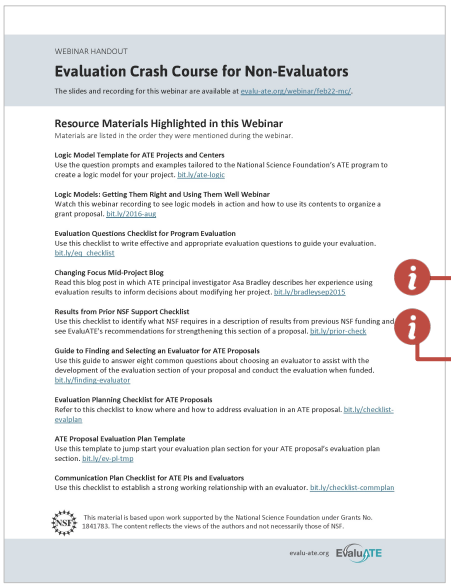

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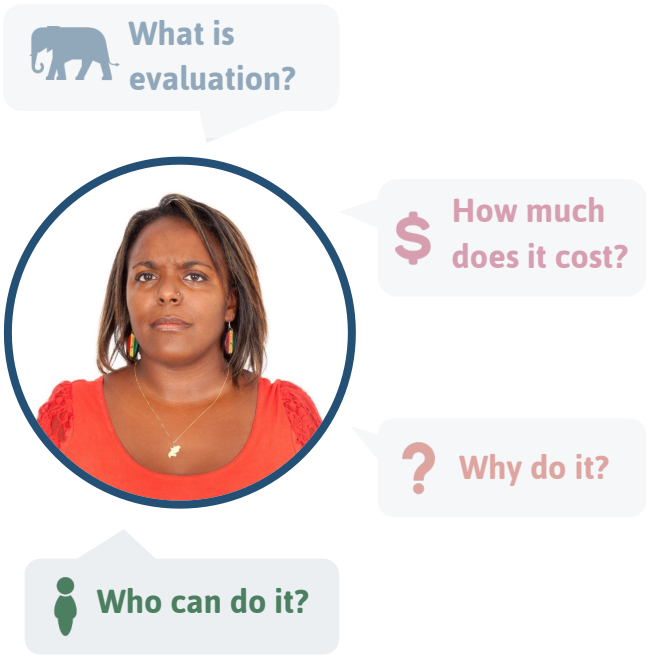
# RESOURCES

- Changing Focus Mid-project (Asa's blogpost )
- Results from Prior NSF Support Checklist

# QUESTIONS

PUT IN CHAT BOX



# WHO CAN DO IT?

**Who can do it?**

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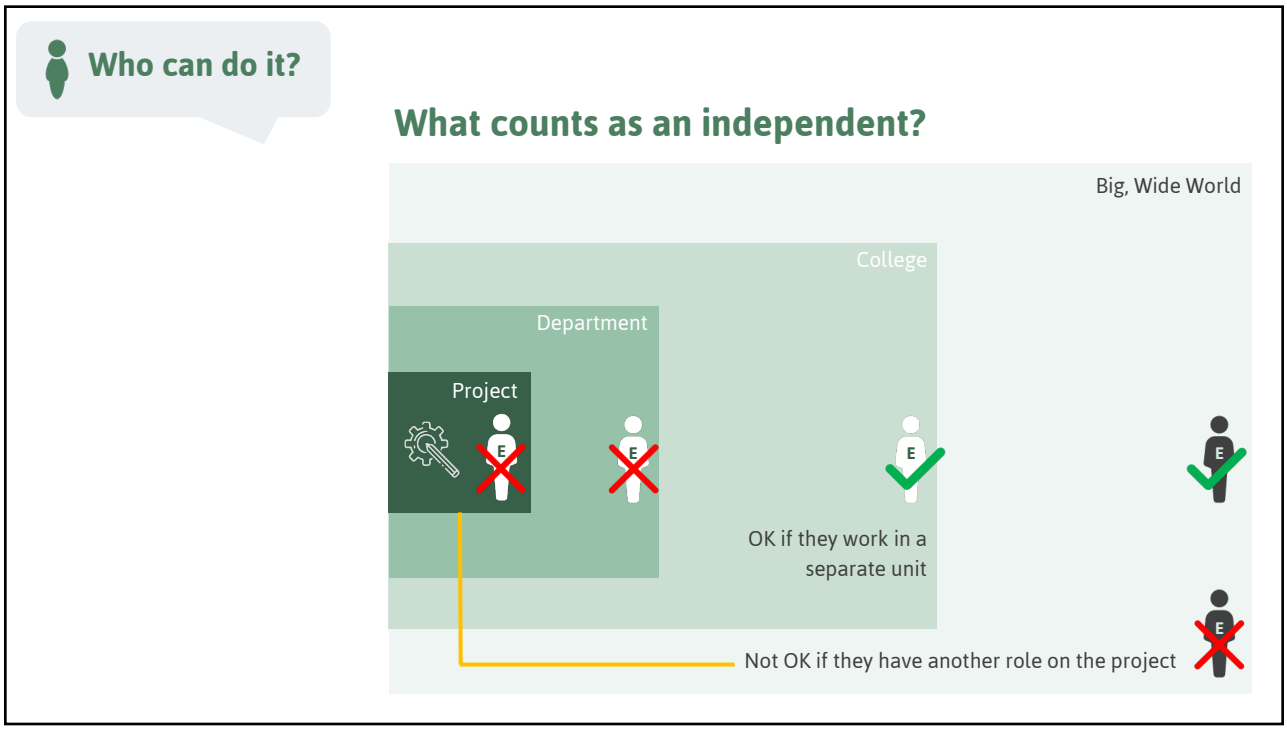
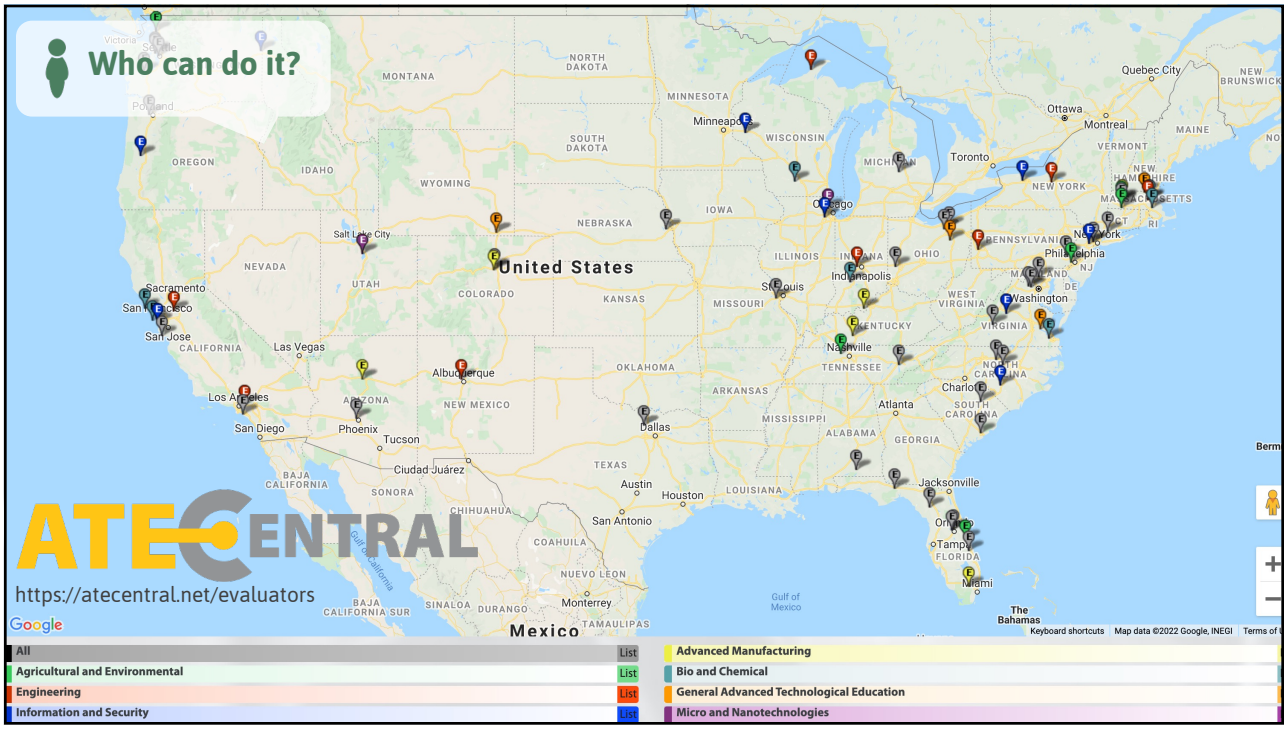
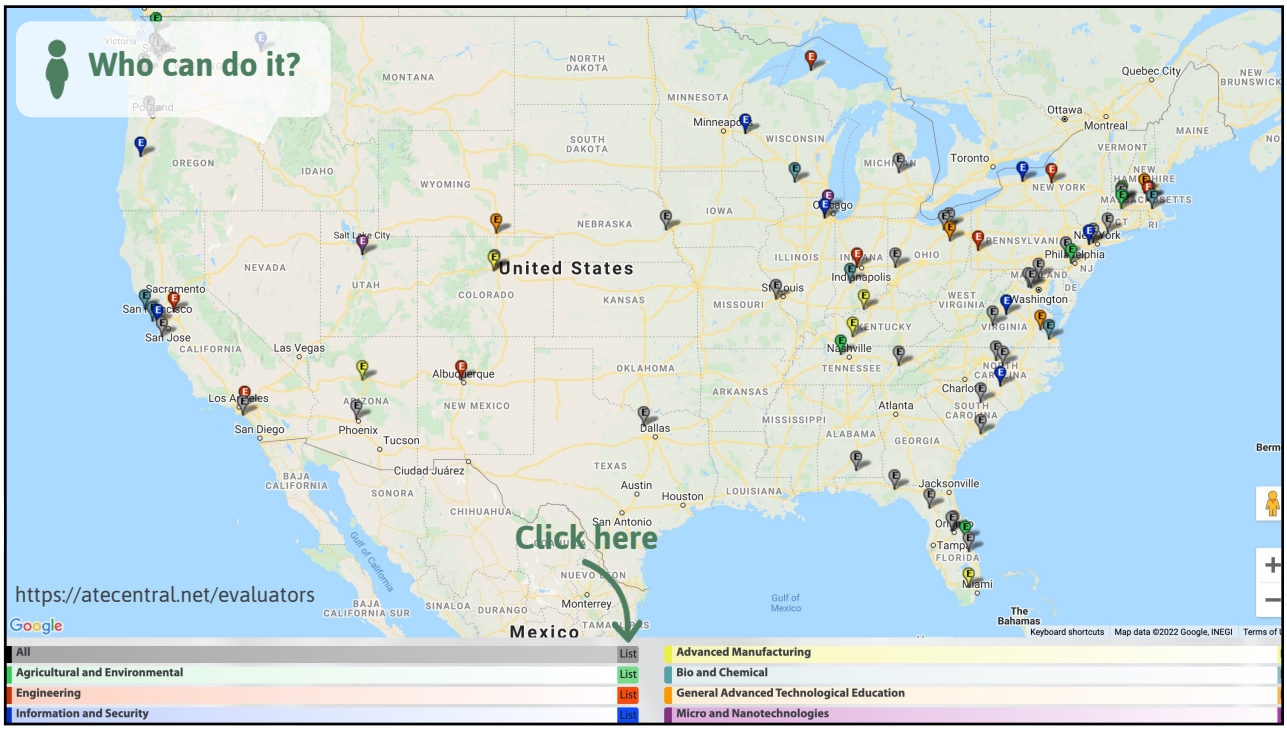

Who can do it?
What counts as an independent?
Big, Wide World
College
Department
Project
OK if they work in a separate unit
Not OK if they have another role on the project


Who can do it?
United States
Mexico
ATECENTRAL
https://atecentral.net/evaluators
All
Agricultural and Environmental
Engineering
Information and Security
Advanced Manufacturing
Bio and Chemical
General Advanced Technological Education
Micro and Nanotechnologies


Who can do it?
United States
Click here
https://atecentral.net/evaluators
Google
Mexico
All
Agricultural and Environmental
Engineering
Information and Security
Advanced Manufacturing
Bio and Chemical
General Advanced Technological Education
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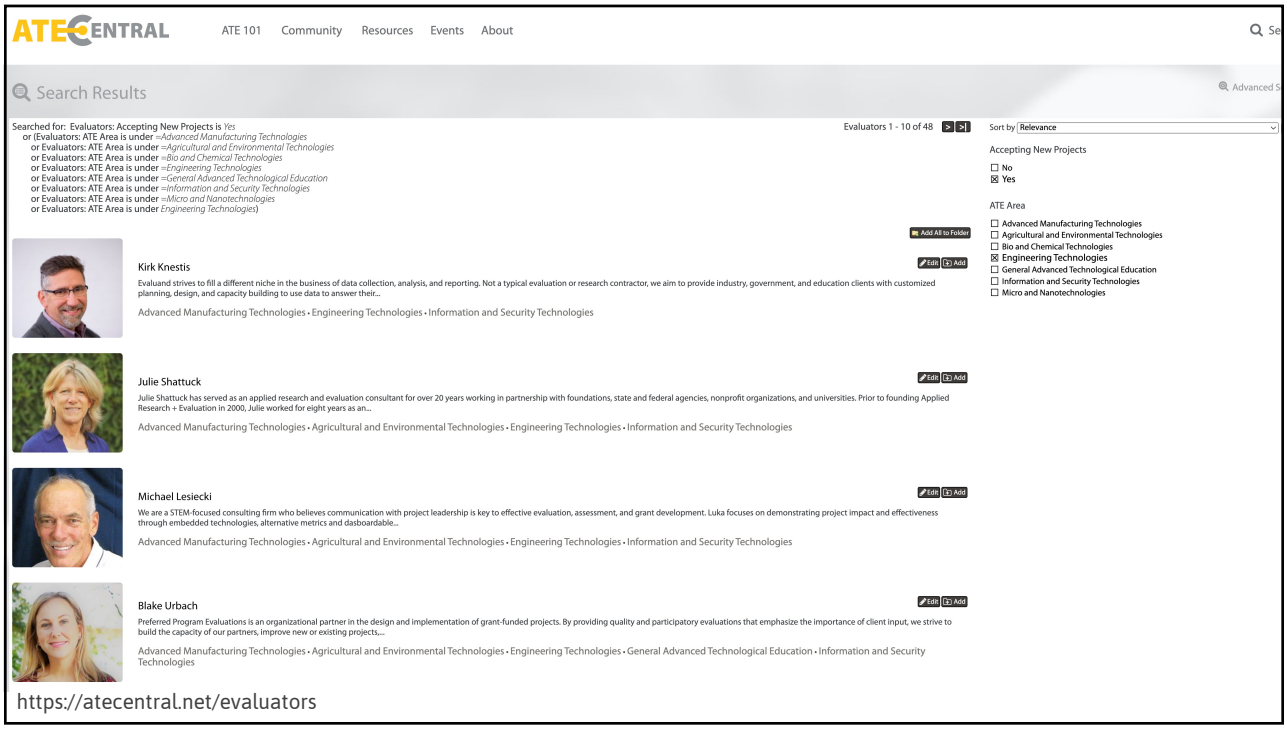
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Events
About
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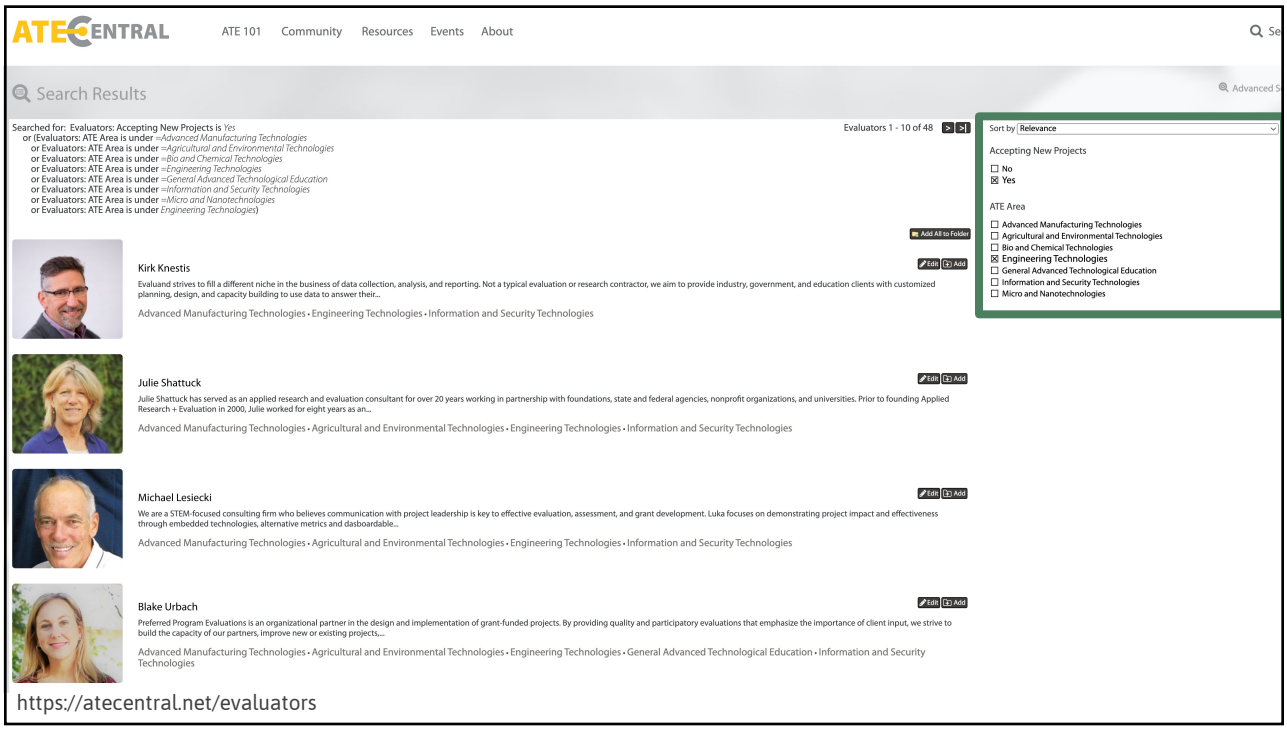
Kirk Knestis
Julie Shattuck
Michael Lesiecki
Blake Urbach
https://atecentral.net/evaluators



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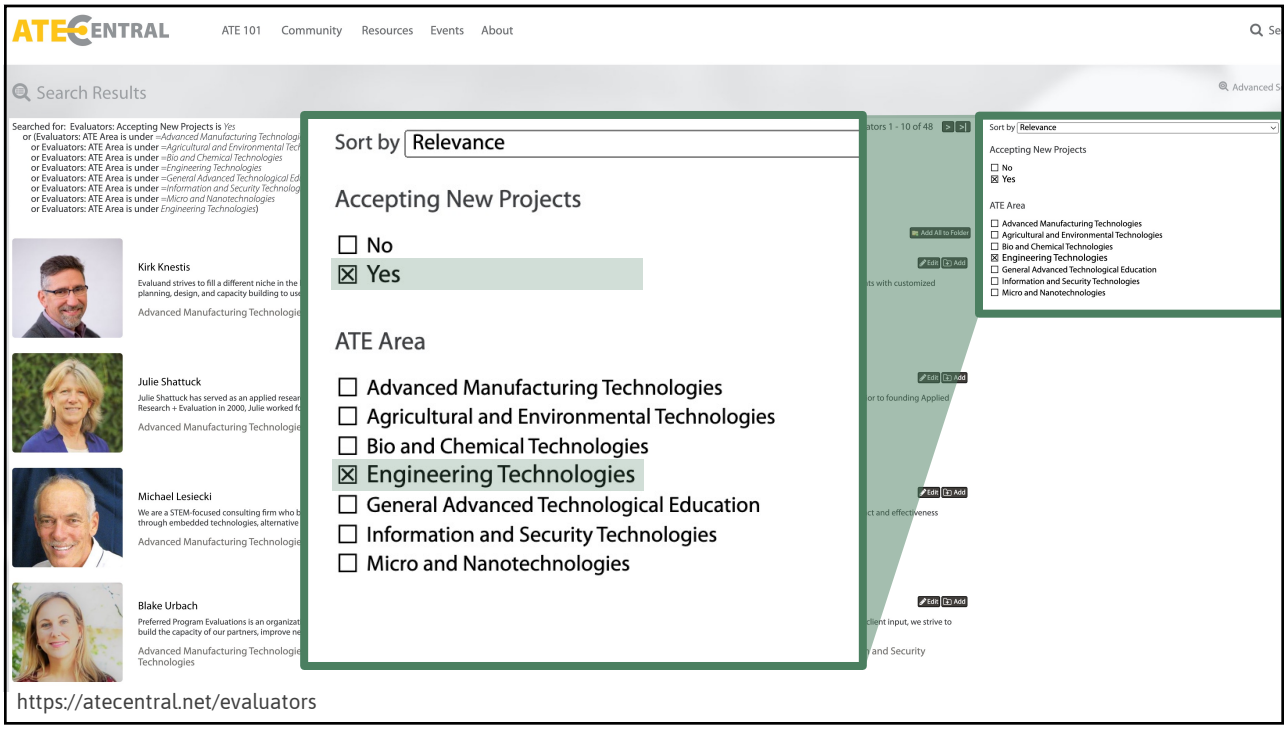

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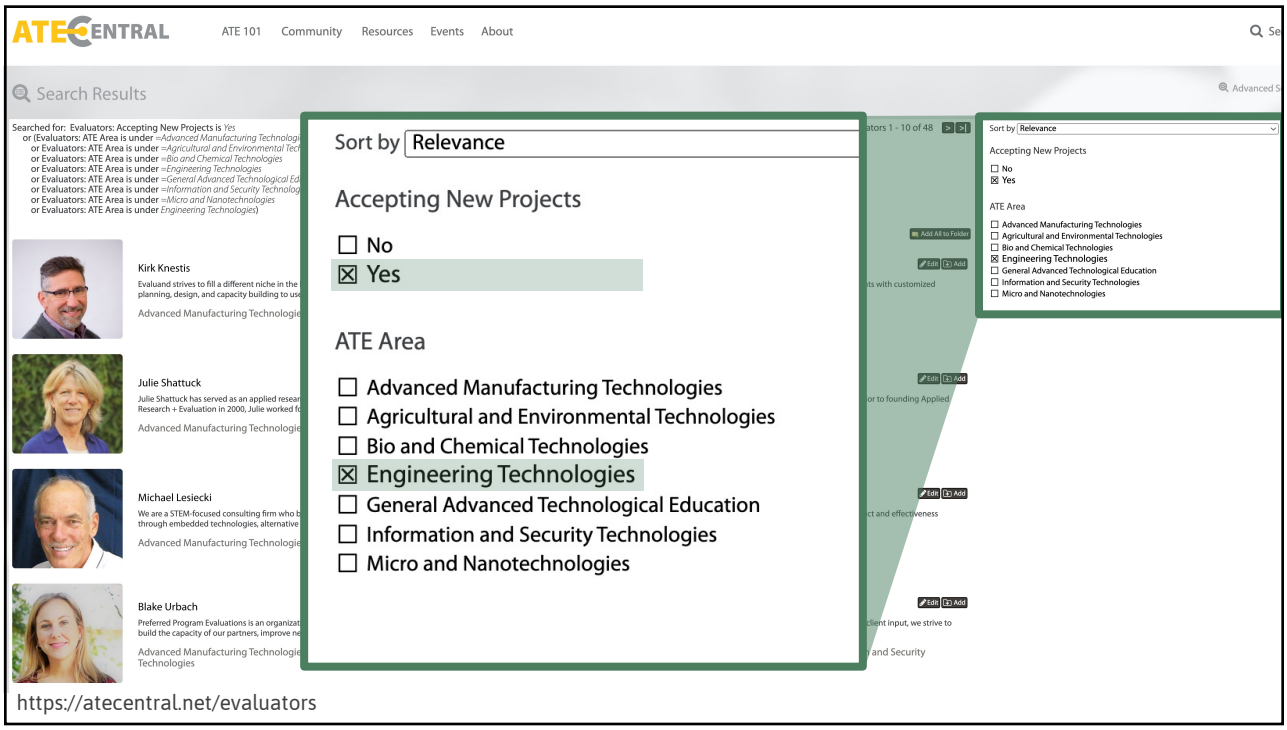


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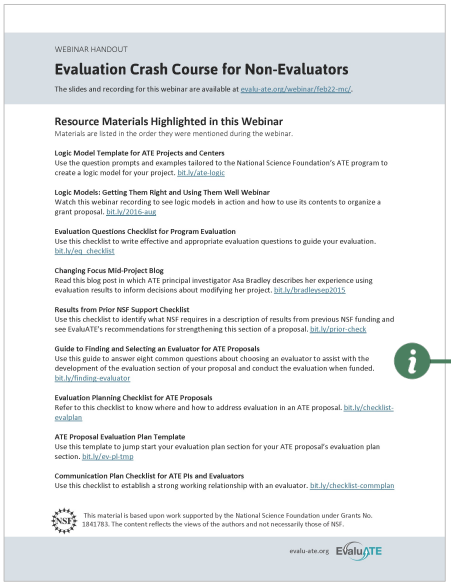

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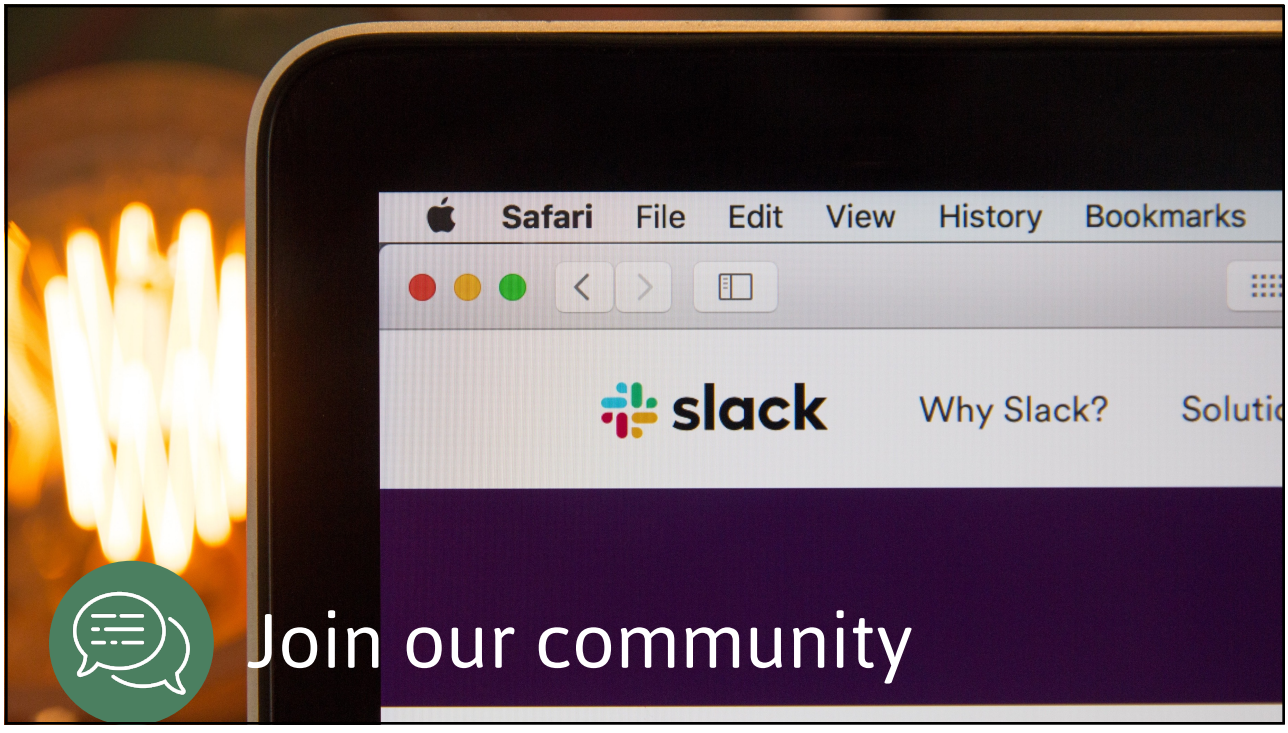
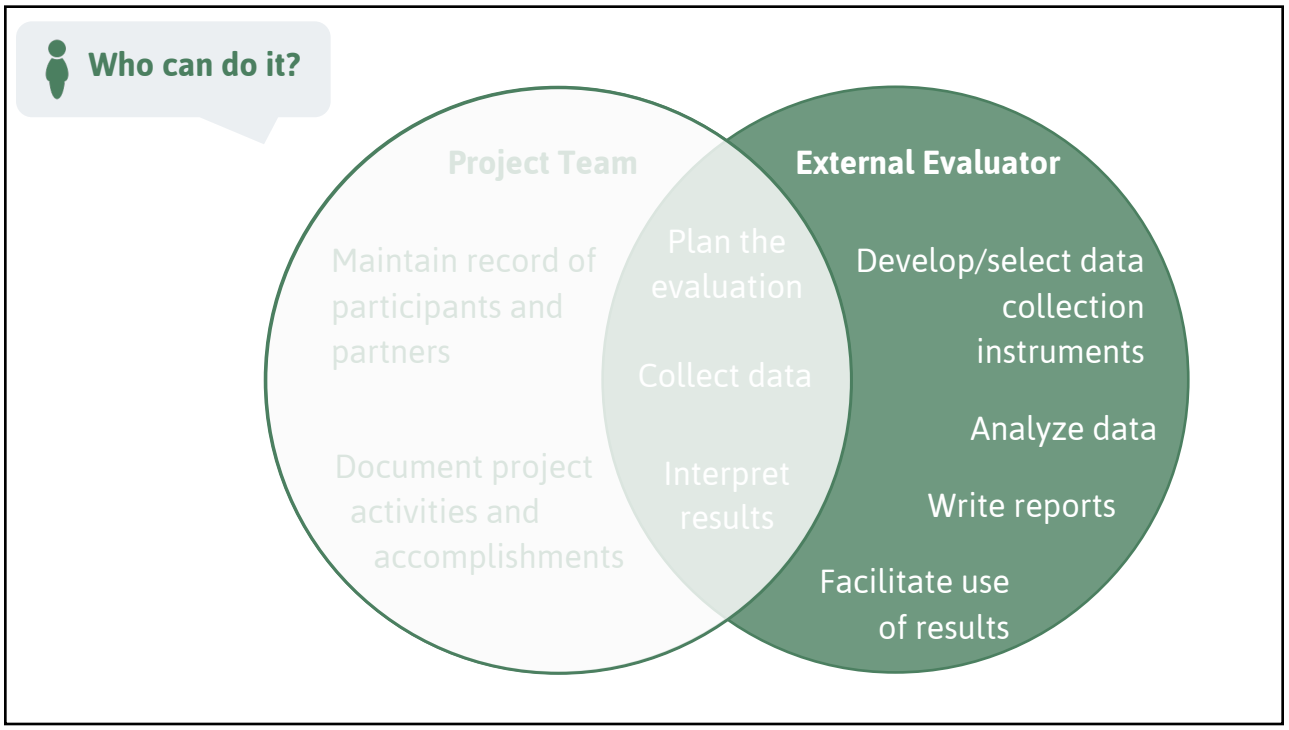
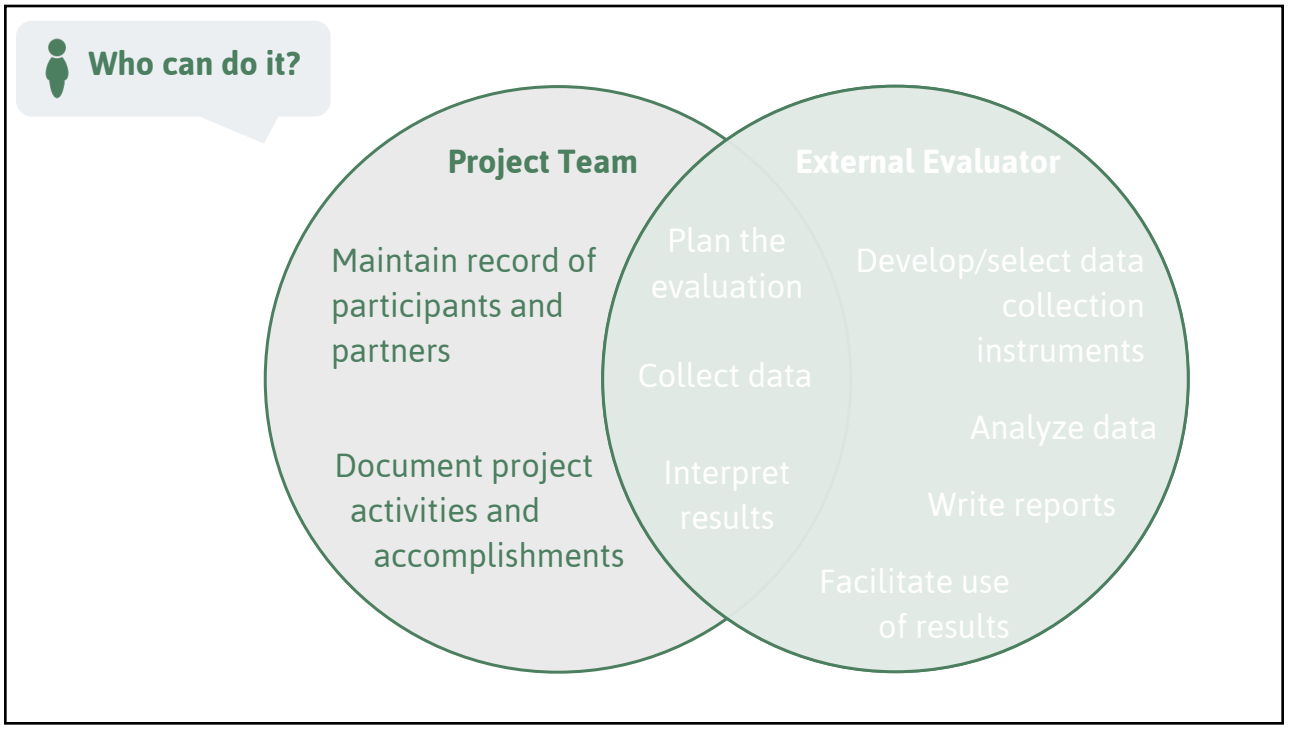
# RESOURCES

Guide to Finding and Selecting an Evaluator




Who can do it?
Project Team
Maintain record of participants and partners
Document project activities and accomplishments
Plan the evaluation
Collect data
Interpret results
External Evaluator
Develop/select data collection instruments
Analyze data
Write reports
Facilitate use of results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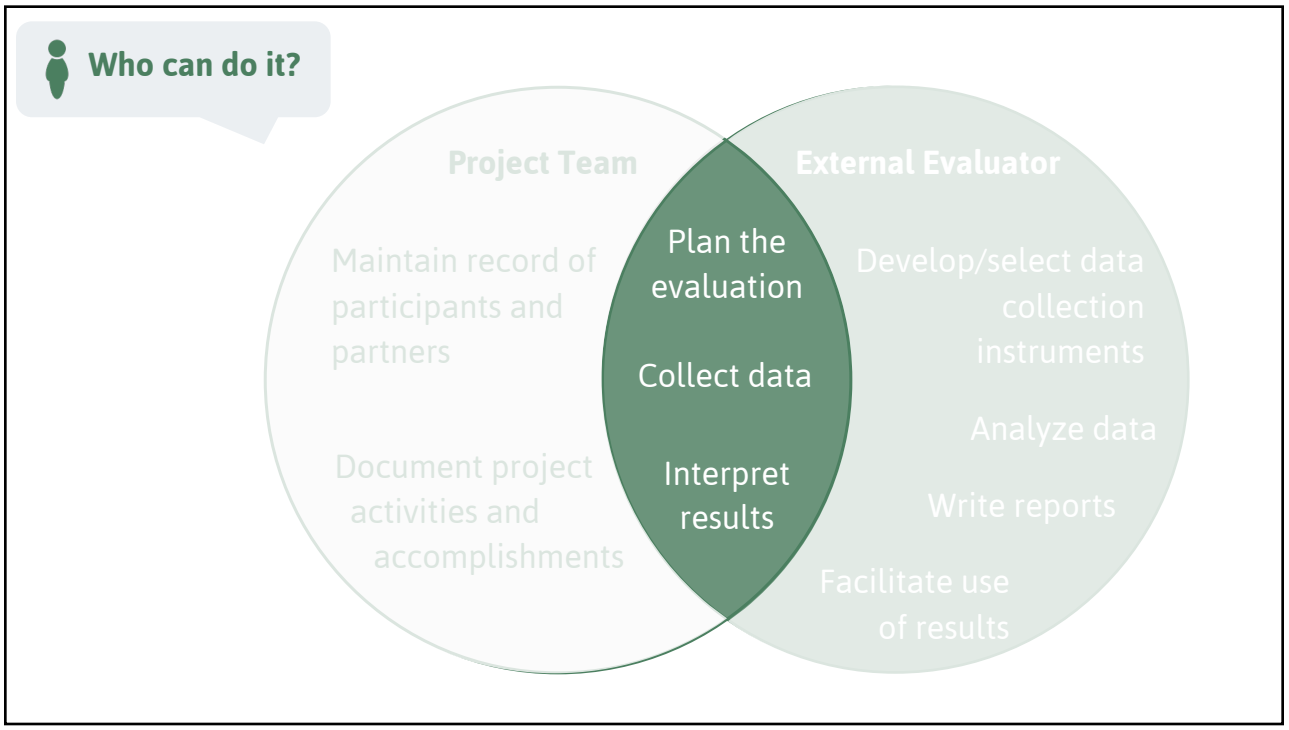
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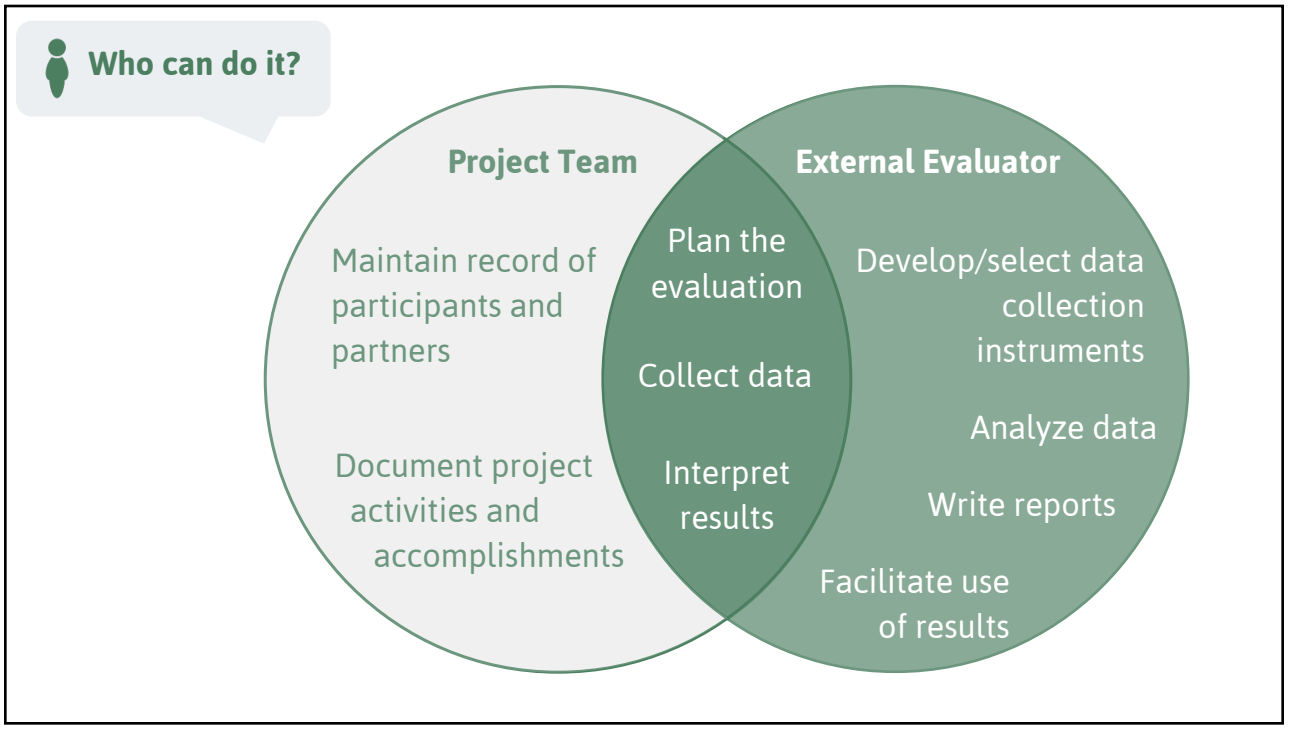
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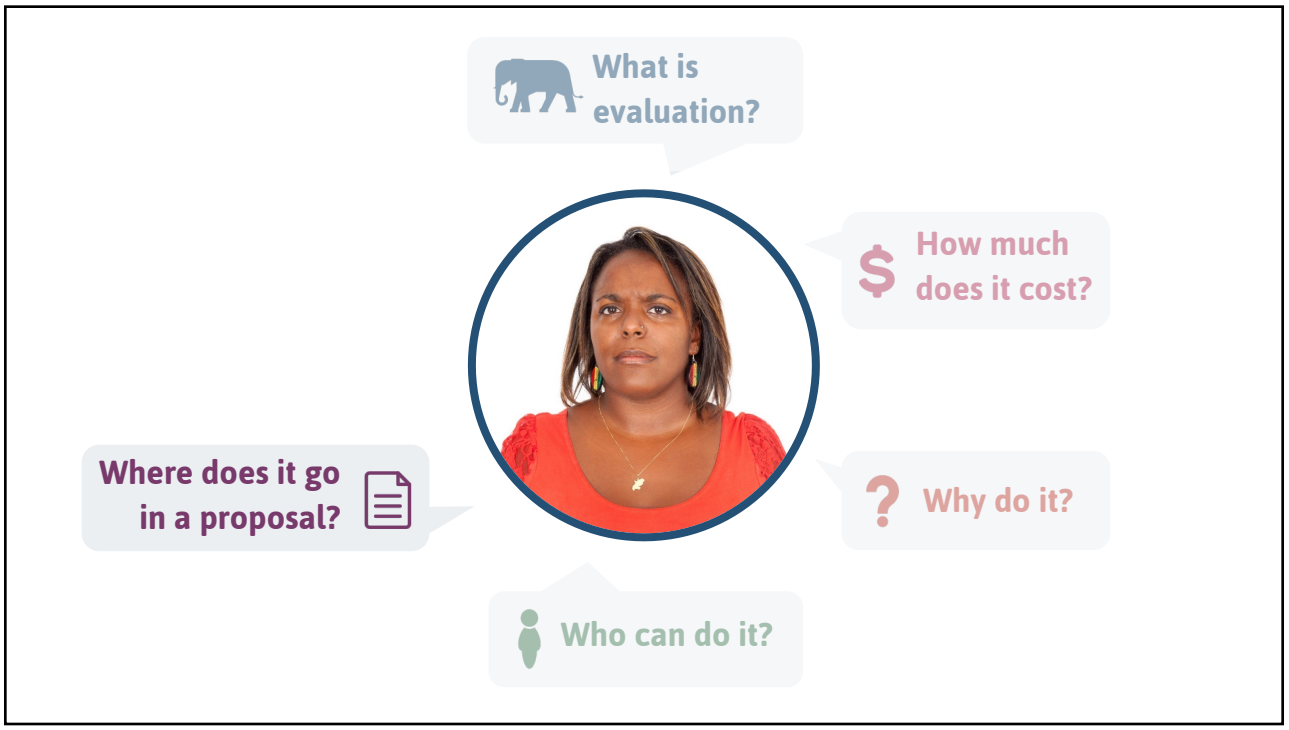

Always check NSF's PAPPG!

**But don't expect much direction for the evaluation section of your proposal.**

Updated for 2021

114

**Where does it go in a proposal?**

## Proposal Components

- ☐ Cover Sheet
- ☐ Project Summary
- ☐ Project Description
- ☐ References Cited
- ☐ Biographical Sketches
- ☐ Budget & Budget Justification
- ☐ Current & Pending Support
- ☐ Facilities, Equipment & Other Resources
- ☐ Supplementary Documents

**Where does it go in a proposal?**

## Proposal Components

- [x] Cover Sheet
- [x] Project Summary
- [x] Project Description
- [x] References Cited
- [ ] Biographical Sketches
- [x] Budget & Budget Justification
- [ ] Current & Pending Support
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- [x] Supplementary Documents

**Information related to the evaluation is needed in these sections.**

**Where does it go in a proposal?**

## Proposal Components

- [x] Project Description **15 pages**
  - Results from Prior NSF Support
  - Rationale
  - Goals, Objectives, Deliverables, Activities
  - Timetable
  - Management Plan
  - Roles & Responsibilities of Senior Personnel
  - Plan for Sustainability
  - Evaluation Plan
  - Dissemination Plan
  - Intellectual Merit
  - Broader Impacts

Where does it go in a proposal?

# Proposal Components

☑ Project Description **15 pages**

**Results from Prior NSF Support**
Rationale
Goals, Objectives, Deliverables, Activities
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Plan for Sustainability
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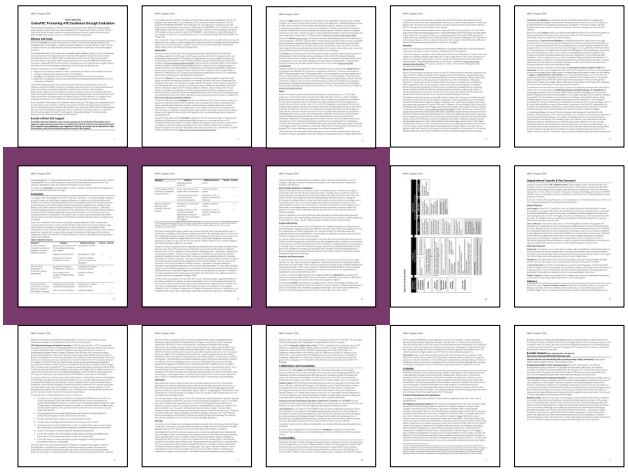
Where does it go in a proposal?

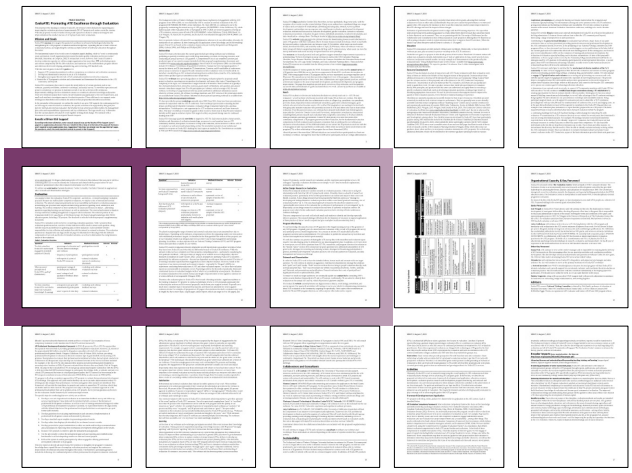
# Project Description



Evaluation plan should be **1-3 pages**.

**Where does it go in a proposal?**

# Project Description

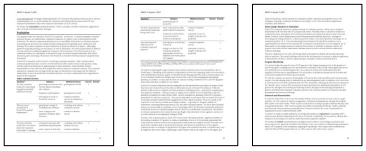


Evaluation plan should be 1-3 pages.

Aim for **1½ pages.**

**Where does it go in a proposal?**

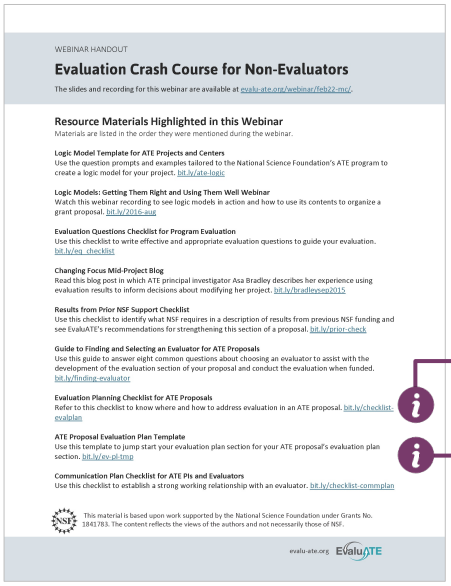
## Evaluation Plan



- Evaluator
- Evaluation questions
- Data collection
- Data analysis and interpretation
- Evaluation deliverables and uses
- Evaluation timeline

**If possible, avoid DIY evaluation plans:** Get help from the evaluator you intend to work with or someone else with evaluation expertise.

Where does it go in a proposal?



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- ATE Proposal Evaluation Plan Template

Where does it go in a proposal?

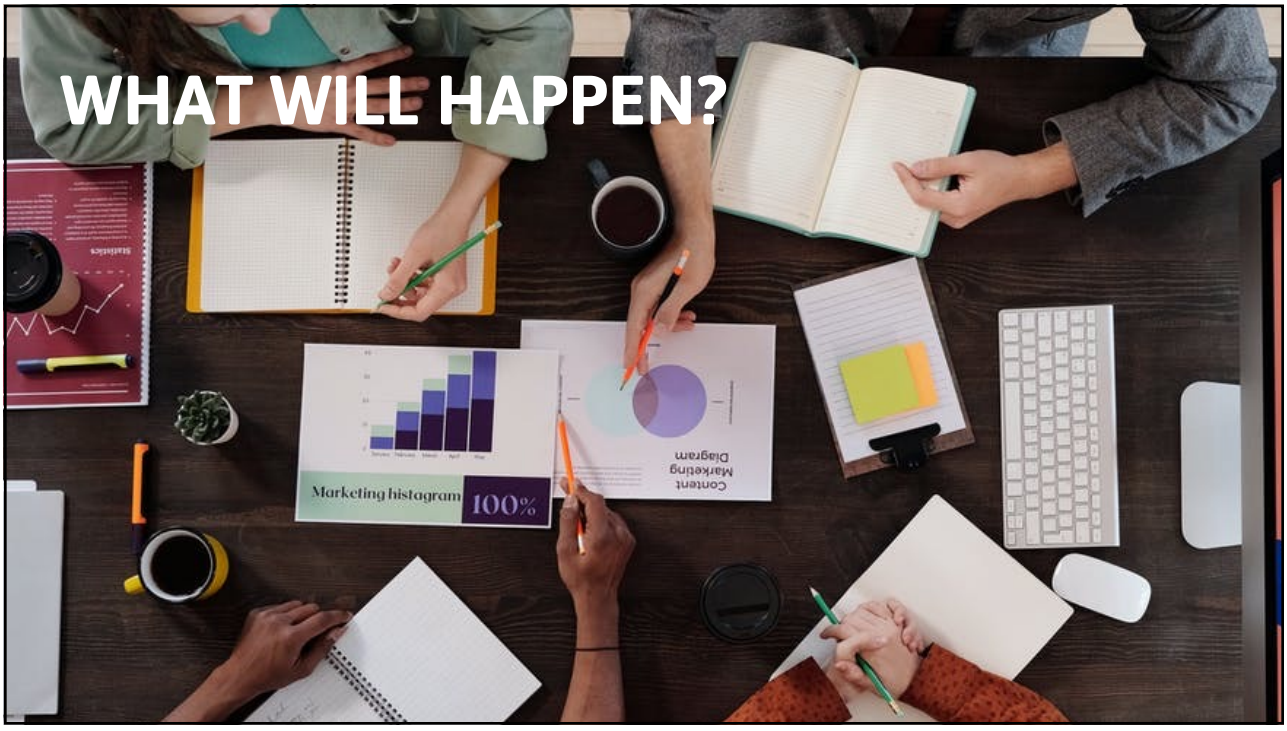
LOLA

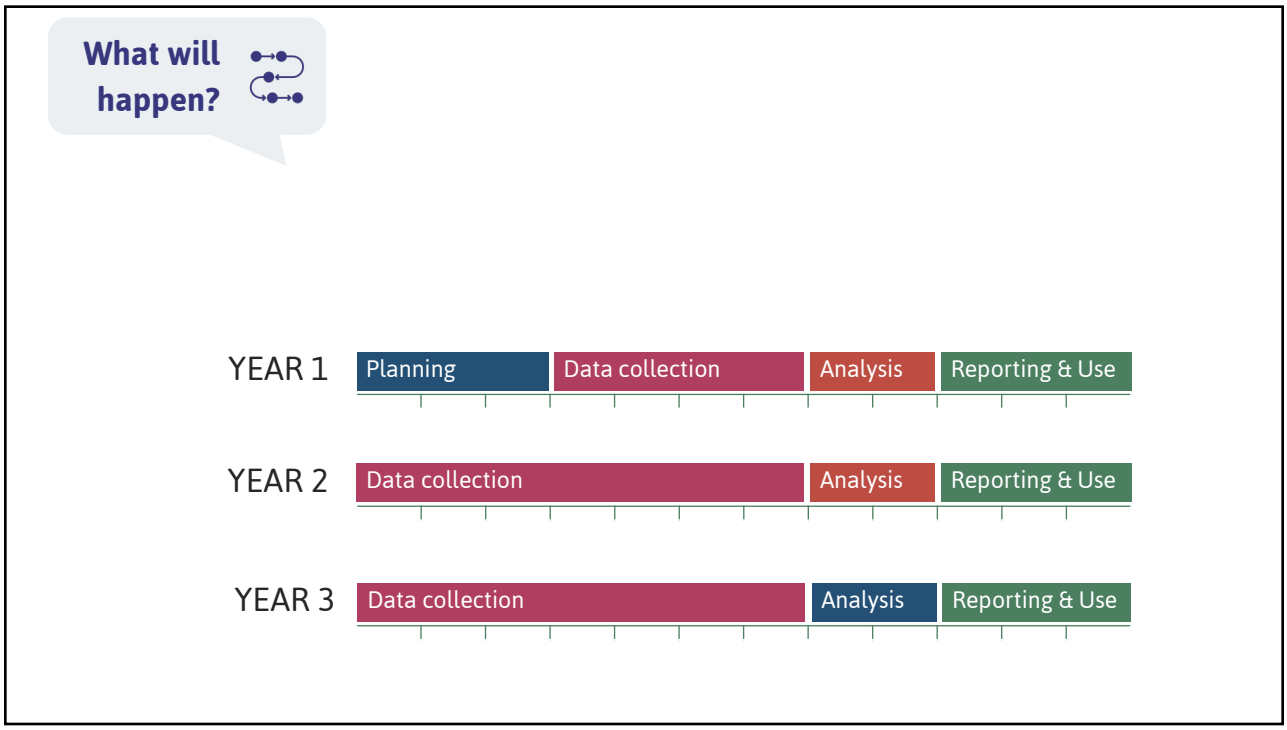
AMY

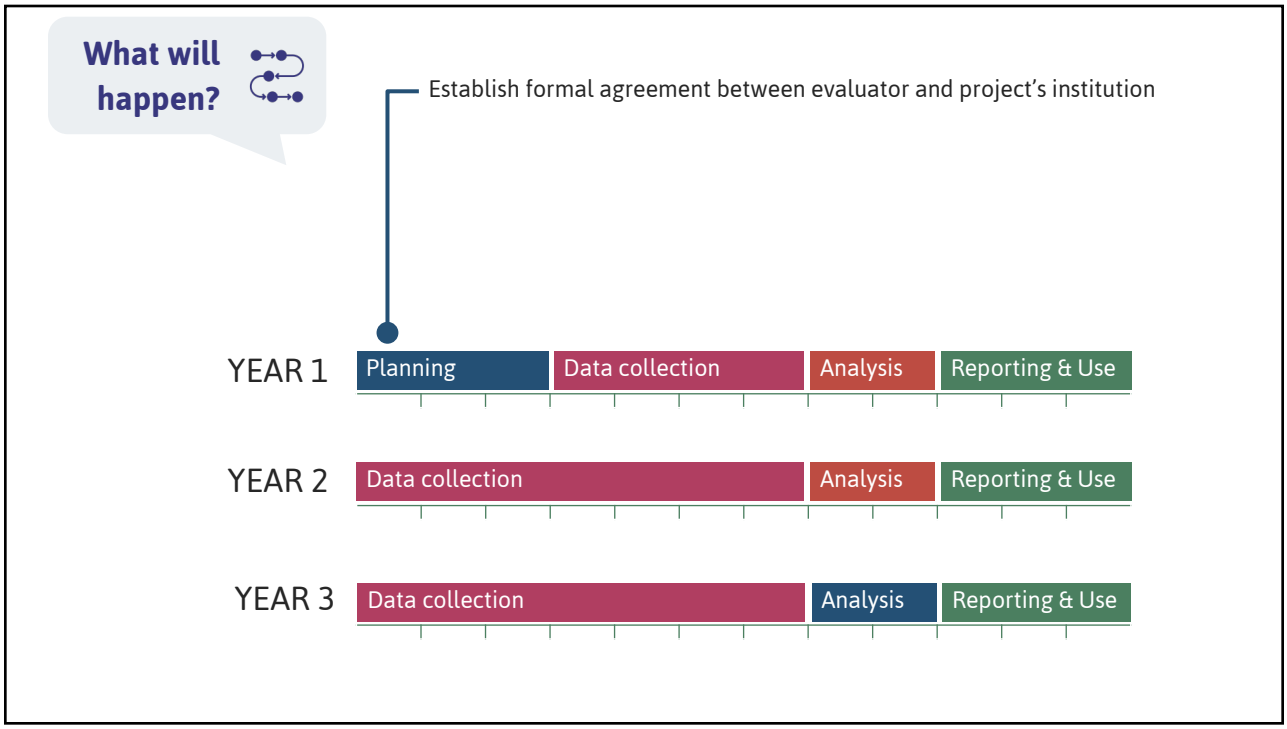
KEITH

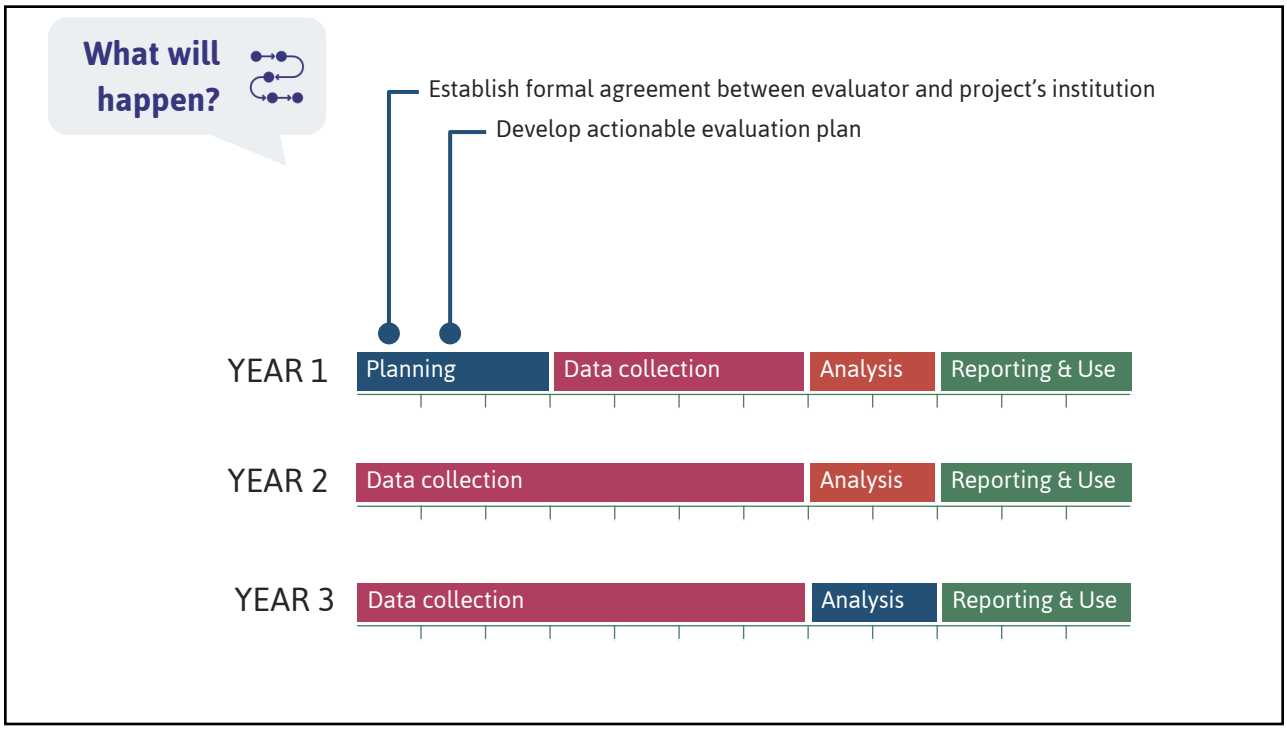
CONNECT WITH A COACH!

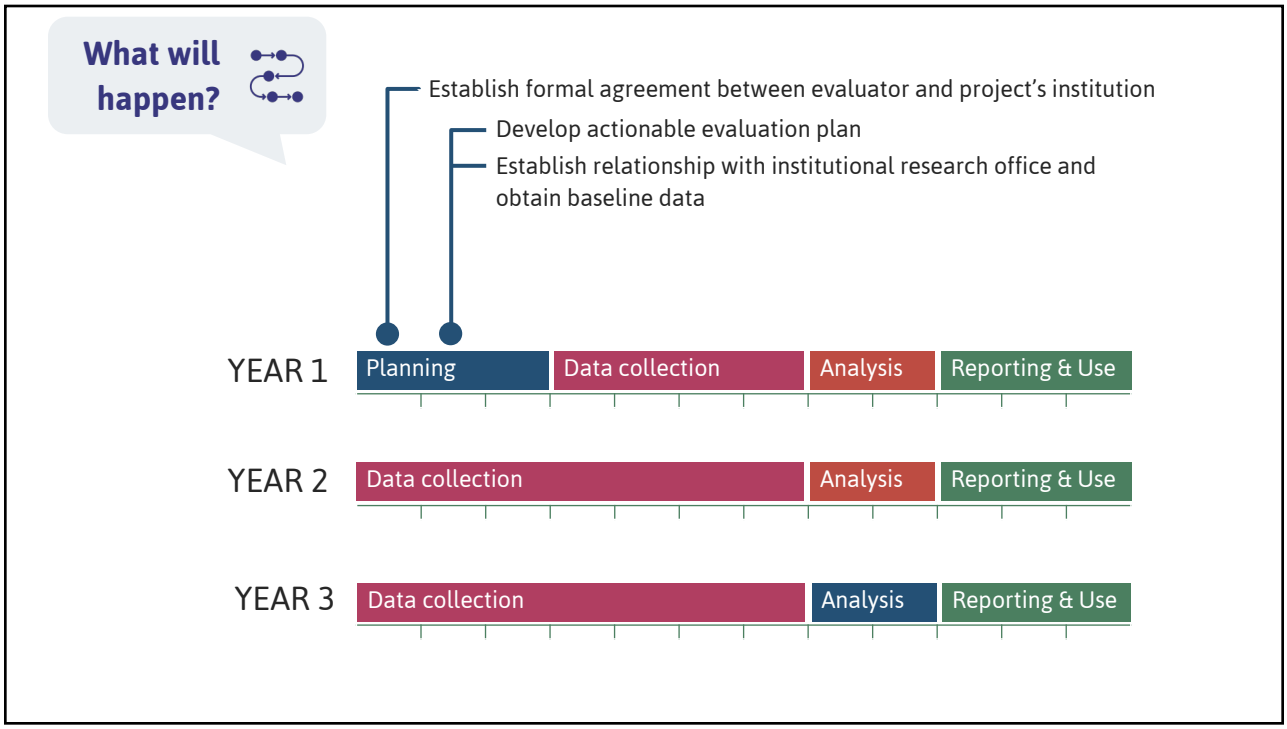
What is evaluation?
What will happen?
How much does it cost?
Where does it go in a proposal?
Why do it?
Who can do it?

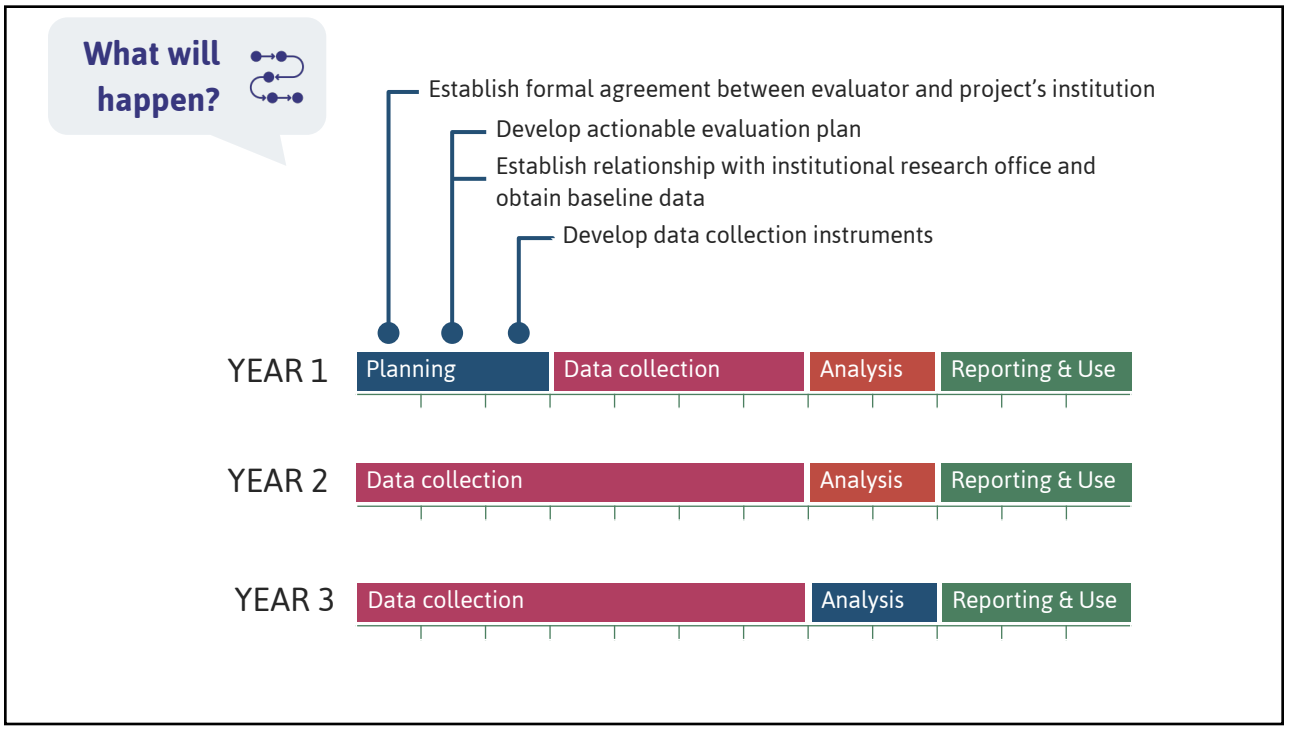

WHAT WILL HAPPEN?
Marketing histagram
100%
Content Marketing Diagram

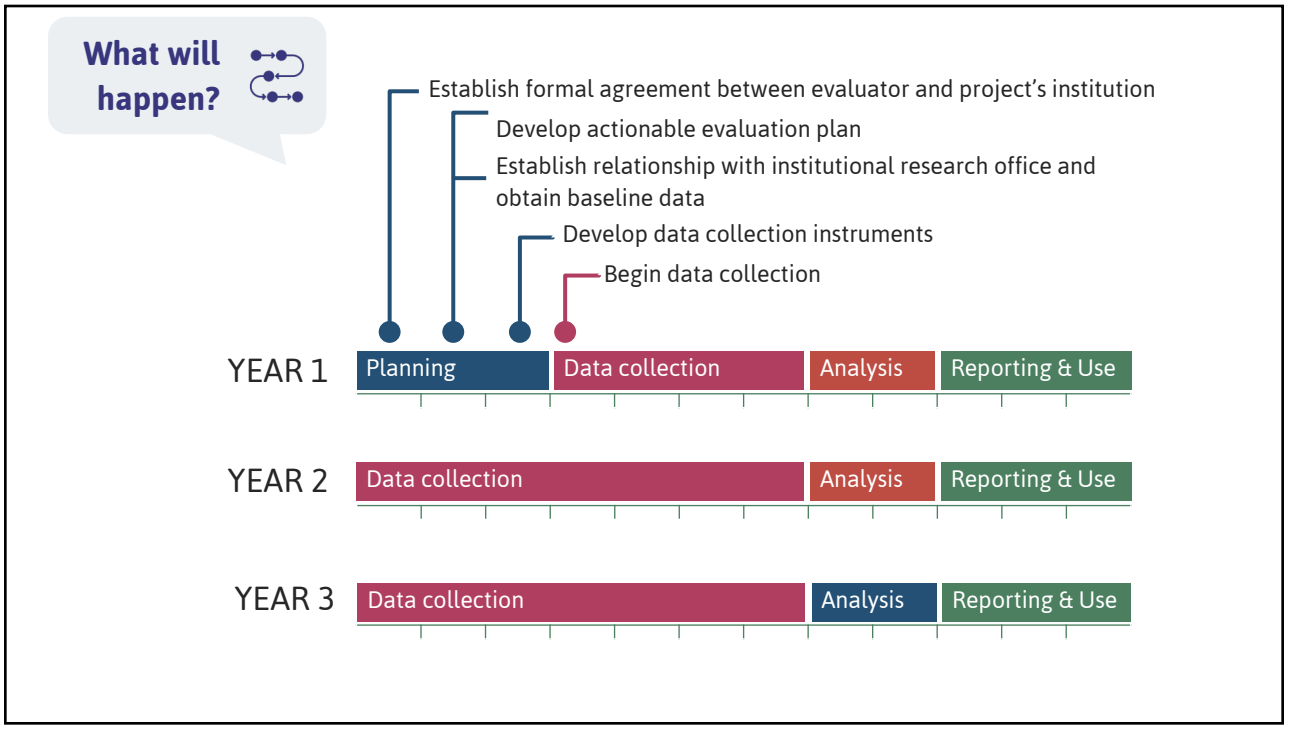

What will happen?
YEAR 1
Planning
Data collection
Analysis
Reporting & Use
YEAR 2
Data collection
Analysis
Reporting & Use
YEAR 3
Data collection
Analysis
Reporting & Use


What will happen?
Establish formal agreement between evaluator and project's institution
YEAR 1
Planning
Data collection
Analysis
Reporting & Use
YEAR 2
Data collection
Analysis
Reporting & Use
YEAR 3
Data collection
Analysis
Reporting & Use

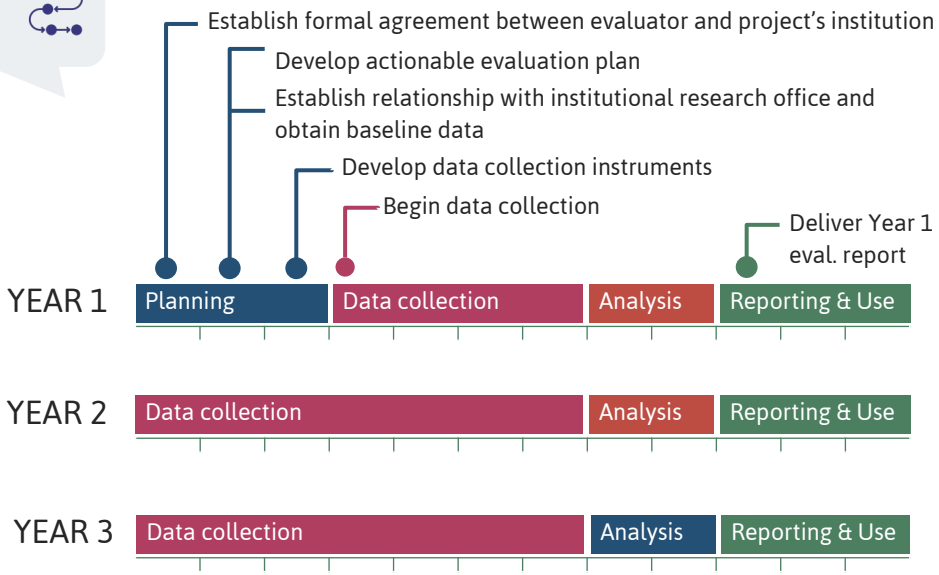

What will happen?
Establish formal agreement between evaluator and project's institution
Develop actionable evaluation plan
YEAR 1
Planning
Data collection
Analysis
Reporting & Use
YEAR 2
Data collection
Analysis
Reporting & Use
YEAR 3
Data collection
Analysis
Reporting & Use


What will happen?
Establish formal agreement between evaluator and project's institution
Develop actionable evaluation plan
Establish relationship with institutional research office and obtain baseline data
YEAR 1
Planning
Data collection
Analysis
Reporting & Use
YEAR 2
Data collection
Analysis
Reporting & Use
YEAR 3
Data collection
Analysis
Reporting & Use

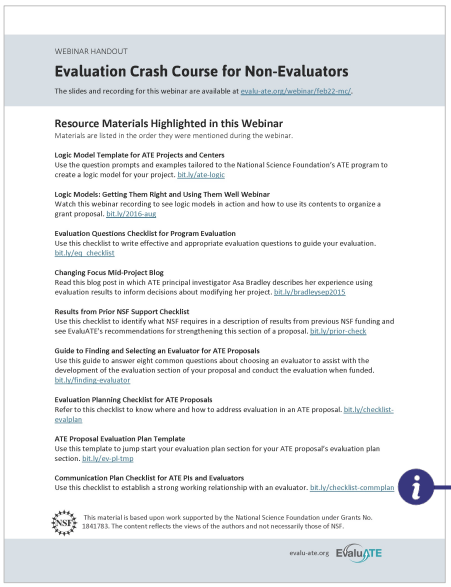

What will happen?
Establish formal agreement between evaluator and project's institution
Develop actionable evaluation plan
Establish relationship with institutional research office and obtain baseline data
Develop data collection instruments
YEAR 1
Planning
Data collection
Analysis
Reporting & Use
YEAR 2
Data collection
Analysis
Reporting & Use
YEAR 3
Data collection
Analysis
Reporting & Use


What will happen?
Establish formal agreement between evaluator and project's institution
Develop actionable evaluation plan
Establish relationship with institutional research office and obtain baseline data
Develop data collection instruments
Begin data collection
YEAR 1
Planning
Data collection
Analysis
Reporting & Use
YEAR 2
Data collection
Analysis
Reporting & Use
YEAR 3
Data collection
Analysis
Reporting & Use

## What will happen?




## What will happen?



WEBINAR HANDOUT

**Evaluation Crash Course for Non-Evaluators**

The slides and recording for this webinar are available at evalu-ate.org/webinar/feb22-mc/.

**Resource Materials Highlighted in this Webinar**

Materials are listed in the order they were mentioned during the webinar.

**Logic Model Template for ATE Projects and Centers**
Use the question prompts and examples tailored to the National Science Foundation's ATE program to create a logic model for your project. bit.ly/ate-logic

**Logic Models: Getting Them Right and Using Them Well Webinar**
Watch this webinar recording to see logic models in action and how to use its contents to organize a grant proposal. bit.ly/2016-aup

**Evaluation Questions Checklist for Program Evaluation**
Use this checklist to write effective and appropriate evaluation questions to guide your evaluation. bit.ly/eq_checklist

**Changing Focus Mid-Project Blog**
Read this blog post in which ATE principal investigator Asa Bradley describes her experience using evaluation results to inform decisions about modifying her project. bit.ly/bradleysep2015

**Results from Prior NSF Support Checklist**
Use this checklist to identify what NSF requires in a description of results from previous NSF funding and see EvaluATE's recommendations for strengthening this section of a proposal. bit.ly/prior-check

**Guide to Finding and Selecting an Evaluator for ATE Proposals**
Use this guide to answer eight common questions about choosing an evaluator to assist with the development of the evaluation section of your proposal and conduct the evaluation when funded. bit.ly/finding-evaluator

**Evaluation Planning Checklist for ATE Proposals**
Refer to this checklist to know where and how to address evaluation in an ATE proposal. bit.ly/checklist-evalplan

**ATE Proposal Evaluation Plan Template**
Use this template to jump start your evaluation plan section for your ATE proposal's evaluation plan section. bit.ly/ev-pl-tmp

**Communication Plan Checklist for ATE PIs and Evaluators**
Use this checklist to establish a strong working relationship with an evaluator. bit.ly/checklist-commplan

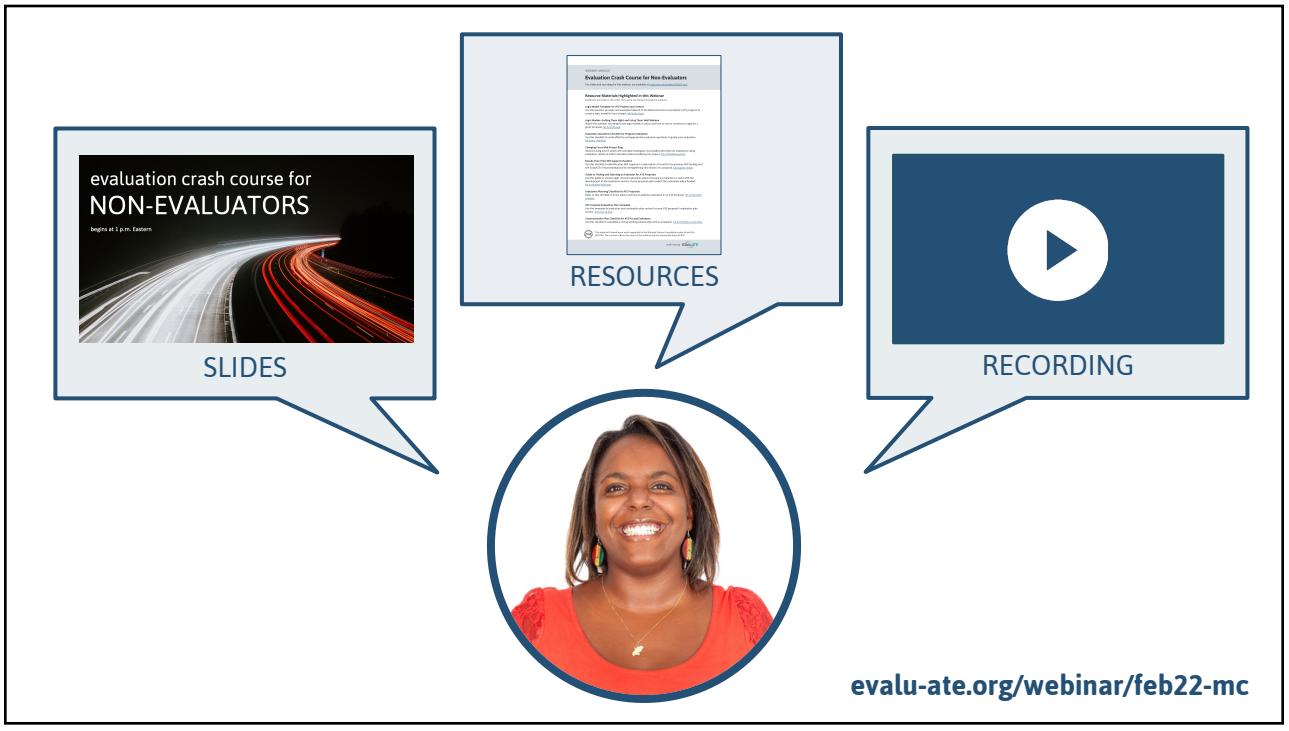
This material is based upon work supported by the National Science Foundation under Grants No. 1841783. The content reflects the views of the authors and not necessarily those of NSF.

evalu-ate.org EvaluATE

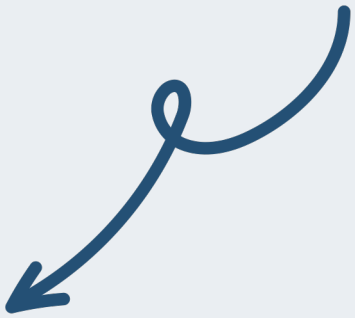
# RESOURCES

Communication Plan Checklist for ATE PIs and Evaluators

What is evaluation?
What will happen?
How much does it cost?
Where does it go in a proposal?
Why do it?
Who can do it?


evaluation crash course for
NON-EVALUATORS
begins at 1 p.m. Eastern
SLIDES
RESOURCES
RECORDING
evalu-ate.org/webinar/feb22-mc

# QUESTIONS

PUT IN CHAT BOX

# Post Webinar Survey