Getting Everyone on the Same Page
Practical Strategies for Evaluator-Stakeholder Communication

The webinar will begin at 1 p.m. Eastern.

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Getting Everyone on the Same Page
Practical Strategies for Evaluator-Stakeholder Communication

EvaluATE Webinar Series
May 22, 2019

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MATERIALS

- Slides
- Handout
- Recording

INTRODUCTIONS

Mike Lesiecki
Lyssa Wilson Becho
Kelly Robertson

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Getting Everyone on the Same Page
Practical Strategies for Evaluator-Stakeholder Communication

BEHIND THE SCENES

Emma Perk
Lori Wingate
Cynthia Williams
Janet Pinhorn
Shannon Payne

This material is based upon work supported by the National Science Foundation under grant number 1600992.

Any opinions, findings, and conclusions or recommendations expressed in this material are those of the presenters and do not necessarily reflect the views of NSF.
WHY FOCUS ON COMMUNICATION?

IF YOU ARE AN ...
evaluator
IF YOU ARE A …
principal investigator or
other project staff

HAVE YOU EVER…
HAVE YOU EVER…
been confused about the purpose of an evaluation activity?

HAVE YOU EVER…
received a piece of evaluation data too late for it to be useful?
HAVE YOU EVER…
found that the final evaluation report
didn’t address important project
needs?

GOOD COMMUNICATION
Getting Everyone on the Same Page
Practical Strategies for Evaluator-Stakeholder Communication

EVALUATION CYCLE

- Ask important questions
- Gather evidence
- Interpret findings
- Report and use results

GOOD COMMUNICATION IS ESSENTIAL!

- Clarity of expectations
- Stakeholder buy-in
- Utility of findings

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GOOD COMMUNICATION = GOOD EVALUATION
Getting Everyone on the Same Page
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Agenda

BEFORE EVALUATION BEGINS
Question break!

THROUGHOUT THE EVALUATION
Question break!

AT THE END OF THE EVALUATION
Question break!

Communication

BEFORE EVALUATION BEGINS
QUESTIONS EVALUATORS ASK
What should evaluators ask clients in the first meeting?

Go-to questions for first meetings

- Why do you want to have an evaluation conducted?
- How do you know when the project is successful?
- What challenges do you anticipate with implementation of the project?
- How would you like the evaluation results communicated?

QUESTIONS EVALUATORS ASK
QUESTIONS CLIENTS ASK
What should clients ask evaluators in a first meeting?

QUESTIONS CLIENTS ASK
Go-to questions for first meetings

- How often will we be in contact?
- How will you ensure the evaluation will be designed for my audience or context?
- How far in advance will we receive draft reports?
- Can I see an example of your reports?
- Will you make recommendations in the report?
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BUDGET MENU
Create a budget menu

<table>
<thead>
<tr>
<th>Draft Evaluation Options</th>
<th>Economic Self-Sufficiency Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection and Analysis of Participant &amp; Quantitative Program Data</td>
<td></td>
</tr>
<tr>
<td>Overview of Program</td>
<td>Qualitative data sources and summaries of the program &amp; its context Lead, identify phases of the program &amp; its context Lead, identify phases of the program &amp; its context</td>
</tr>
<tr>
<td>Qualitative data collection and analysis</td>
<td>Qualitative data collection and analysis</td>
</tr>
<tr>
<td>Focus group with participants</td>
<td>Focus group with participants</td>
</tr>
<tr>
<td>Interviews with program participants</td>
<td>Interviews with program participants</td>
</tr>
<tr>
<td>Collecting quantitative data</td>
<td>Collecting quantitative data</td>
</tr>
<tr>
<td>Analysis of qualitative and quantitative data</td>
<td>Analysis of qualitative and quantitative data</td>
</tr>
<tr>
<td>Reports data back to stakeholders</td>
<td>Reports data back to stakeholders</td>
</tr>
</tbody>
</table>

EVALUATION MATRIX
Use a matrix to maximize communication

Evaluation Methods

<table>
<thead>
<tr>
<th>Approach</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>vs.</td>
<td></td>
</tr>
</tbody>
</table>

vs. = versus

Evaluation Methods

<table>
<thead>
<tr>
<th>Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td>vs.</td>
</tr>
</tbody>
</table>

vs. = versus

Questions, Criteria, and Data Collection Methods

<table>
<thead>
<tr>
<th>Questions, Criteria, and Data Collection Methods</th>
</tr>
</thead>
</table>

vs. = versus

Questions, Criteria, and Data Collection Methods

| Questions, Criteria, and Data Collection Methods |

vs. = versus
**EVALUATION MATRIX**

Use a matrix to maximize communication

<table>
<thead>
<tr>
<th>Evaluation Question</th>
<th>Criteria</th>
<th>Indicators</th>
<th>Standards</th>
<th>Method / Source</th>
<th>Instrument</th>
</tr>
</thead>
<tbody>
<tr>
<td>(What want to know?)</td>
<td>(Dimension of quality)</td>
<td>(What will be measured?)</td>
<td>(What does success look like?)</td>
<td>(How gather data and from where)</td>
<td>(Tool used to collect data)</td>
</tr>
</tbody>
</table>

**Everyday description**

---

**EVALUATION MATRIX**

Example

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Indicators</th>
<th>Data Source/Instrument</th>
<th>Success Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>To what extent did participant trauma behavior change?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PTSD symptoms levels</td>
<td>PTSD Symptom Scores</td>
<td>Participants/ PTSD Instruments</td>
<td>Pre/Post change statistically significant at the .01 level using Wilcoxon signed rank test</td>
</tr>
<tr>
<td>PTSD symptoms’ level of impact on daily life</td>
<td>PTSD symptom interference in daily life</td>
<td>Participants/ PTSD Instruments</td>
<td></td>
</tr>
<tr>
<td>Safe coping behaviors, self-esteem, self-efficacy, and resilience</td>
<td>Safe coping behavior scores (safe coping behavior, substance use, self-esteem, self-efficacy, &amp; resilience)</td>
<td>Participants/ SSQ Instruments</td>
<td></td>
</tr>
</tbody>
</table>

| To what extent did the Project educate the community about trauma? |
| Reach community members | # of people trained | ORG documents or database | 150 by 9/30/2020 |
| Demonstrate change in knowledge | # change in knowledge about impact of trauma and violence on adult functioning on pre/post-test scores | Presentation pre/post feedback form | 120 by 9/30/2020 |
ACKNOWLEDGE EXPERTISE
Utilize multiple knowledge bases

Evaluation Expertise

Quality Evaluation

Project Expertise

ACKNOWLEDGE EXPERTISE
Utilize multiple project expertise
COMMUNICATION PLAN
Put it in writing!

- Designate primary contacts
- Set up recurring meetings
- Agree on deliverable review process
- Clarify who is responsible for disseminating reports

SUMMARY
Communication before the evaluation begins

- Prepare questions to ask at first meeting
- Present evaluation options in a budget menu
- Organize evaluation matrix by questions
- Acknowledge evaluation and project expertise
- Create a communication plan
Getting Everyone on the Same Page
Practical Strategies for Evaluator-Stakeholder Communication

Communication THROUGHOUT THE EVALUATION

CHEAT SHEETS
Make your evaluation plan useful

Slides, video, and handout:
www.evalu-ate.org/webinars/may19
CHEAT SHEETS
Make your evaluation plan useful

**Evaluation Plan**

**Approach**
- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer nec justo nec sapien pretium blandit non a elit. Sed ac lorem in magna elementum euismod.

**Questions, Criteria, and Data Collection Methods**

- | Questions | Criteria | Indicators | Data Sources & Collection Methods |
- |-----------|----------|------------|----------------------------------|

**CHEAT SHEETS**
Attention to details

- Include date on top
- Include project and evaluator phone numbers
- Make changes obvious
- Include “last updated” date

**Evaluation Summary 2019**

<table>
<thead>
<tr>
<th>Evaluation Questions</th>
<th>Weight</th>
<th>Data Sources &amp; Collection Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Nulla vel pharetra nibh</td>
<td>2. Sed ac dolor et urna bibendum auctor</td>
<td>3. Curabitur sit amet felis euismod, lacinia arcu a, bibendum dui</td>
</tr>
</tbody>
</table>

**2019 Evaluation Timeline**

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

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May 22, 2019

CHEAT SHEETS
Summary of deliverables

<table>
<thead>
<tr>
<th>Evaluation Questions</th>
<th>When reported?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Who is the project serving?</td>
<td></td>
</tr>
<tr>
<td>2. To what extent are individuals utilizing Project services?</td>
<td>✔ ✔ ✔</td>
</tr>
<tr>
<td>3. To what extent did participant trauma behavior change?</td>
<td>✔</td>
</tr>
<tr>
<td>4. To what extent are barriers to participation being addressed?</td>
<td>✔</td>
</tr>
<tr>
<td>5. To what extent did the Project educate the community about trauma?</td>
<td>✔ ✔</td>
</tr>
<tr>
<td>6. How can the Project be improved?</td>
<td>✔</td>
</tr>
</tbody>
</table>

Matched with questions

CHEAT SHEETS
Timeline of major milestones

2019 Evaluation Timeline

<table>
<thead>
<tr>
<th>Activities</th>
<th>MAR</th>
<th>APR</th>
<th>MAY</th>
<th>JUN</th>
<th>JUL</th>
<th>AUG</th>
<th>SEP</th>
<th>OCT</th>
<th>NOV</th>
<th>DEC</th>
<th>JAN</th>
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<tbody>
<tr>
<td>Deliverables</td>
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<td>Dashboard Q1</td>
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<tr>
<td>Site Reports</td>
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<td>Q1 Site Reports</td>
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<td>Q1 Site Reports</td>
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<tr>
<td>Year 4 Semi-Annual Report</td>
<td></td>
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<td>Draft 6/25</td>
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<td>Final 8/15</td>
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<td></td>
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</tr>
</tbody>
</table>

Deadlines

Slides, video, and handout:
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### CHEAT SHEETS
Simplified evaluation matrix

<table>
<thead>
<tr>
<th>Methods</th>
<th>Who</th>
<th>When collected?</th>
<th>Purpose</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Database</td>
<td>Project</td>
<td>Ongoing, Send to Eval Feb, April, August, &amp; Oct</td>
<td>Track participant and implementation data</td>
<td>All participants</td>
</tr>
<tr>
<td>Interview/ focus group protocols</td>
<td>Eval</td>
<td>March/April 2018</td>
<td>Satisfaction, areas for improvement</td>
<td>Participants not complete Graduates</td>
</tr>
<tr>
<td>Interview protocol</td>
<td>Eval</td>
<td>August/September 2018</td>
<td>Impact on life (interviews)</td>
<td>Graduates</td>
</tr>
<tr>
<td>Presentation feedback form</td>
<td>Project</td>
<td>Before and after presentation</td>
<td>Assess knowledge about trauma</td>
<td>All attendees</td>
</tr>
</tbody>
</table>

### CHAT QUESTION
What would you find helpful in a cheat sheet?
MONTHLY EMAIL UPDATES
Keep everyone in the loop

Hello!

MONTHLY EMAIL UPDATES
Keep everyone in the loop

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MONTHLY EMAIL UPDATES
Keep everyone in the loop

- Past Month’s Eval Tasks
- Upcoming Eval Activities
- Asks from Client
- Any Project Updates?

SHARE FINDINGS AS AVAILABLE
Avoid surprises at the end of an evaluation

- Increase use for program improvement
- Increase ownership and buy-in
- Increase validity of interpretation
SHARE FINDINGS AS AVAILABLE
Avoid surprises at the end of an evaluation

SHARE FINDINGS AS AVAILABLE
Avoid surprises at the end of an evaluation
SHARE FINDINGS AS AVAILABLE
Avoid surprises at the end of an evaluation

SUMMARY
Communication throughout the evaluation

- Summarize evaluation plan in a cheat sheet
- Send monthly email updates
- Share preliminary results as available
- Avoid surprises in final report
Communication

AT THE END OF THE EVALUATION

SHARE OUTLINES
When drafting reports
SHARE OUTLINES
When drafting reports

Table 2. Overview of Evaluation Reports

<table>
<thead>
<tr>
<th>Theme of Data</th>
<th>Reported delivered in 2020</th>
<th>Reported delivered in 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation</td>
<td>*Literature of evidence-based success targets and benchmarks</td>
<td>Participant feedback *Feedback from staff</td>
</tr>
<tr>
<td>Program</td>
<td>*Literature review on programmatic best practices</td>
<td></td>
</tr>
<tr>
<td>Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process/</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improvement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outcomes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Focused</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Self-sufficiency matrix data |                                                          | Self-sufficiency matrix data |}
| Supplemental adult data |                                                          | Supplemental adult data    |
| Child supplemental data |                                                          | Child supplemental data    |
| Data on internal measures (self-esteem, resilience, etc.) |                                                          | Data on internal measures (self-esteem, resilience, etc.) |
| Stories from families (active 4 years) |                                                          | Stories from families (active 3 years or fewer) on how ORG has impacted their lives |
| documenting how their barriers to self-sufficiency have change |                                                          | *Standardized education data (if possible) |
|                        |                                                          | *ACE Score data            |
ASK REFLECTIVE QUESTIONS
Report revisions and next steps

ASK REFLECTIVE QUESTIONS
Next steps

- Based on the report, what aspects of the program need improvement?
- How can we facilitate your use of this report?
- What unanswered questions do you have?
- What do you want to see different on the next deliverable?
POLL QUESTION
Which do you think will result in increased use?

A

Recommendations
Project

B

Recommendations
Project

LINK TO EVIDENCE
Conclusions and recommendations

Action or Judgement

Why
## LINK TO EVIDENCE
### Recommendations

<table>
<thead>
<tr>
<th>Recommendations</th>
<th>Evidence for Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td></td>
</tr>
<tr>
<td>Make Action Plan to Improve Content: Create an action plan to improve instructional materials—especially handouts and videos—or activities utilized during group sessions.</td>
<td>A large percentage of participants indicated the handouts and videos were “somewhat helpful” rather than “very helpful” in feedback forms. The percentage of individuals who indicated the material was “somewhat helpful” is as follows: Activities and discussion 29%, handouts 53%, and videos 72%.</td>
</tr>
</tbody>
</table>

## EVALUATION RECOMMENDATIONS
### Document suggestions for future evaluations
### EVALUATION RECOMMENDATIONS

Document suggestions for future evaluations

- **Problem:** Improve the usability of information from session feedback forms. In conversations with Project staff, it was revealed that participants do not always take feedback forms seriously and the forms are not currently helpful in improving individual sessions. The forms were originally designed to assess feedback during the planning phase, and since that phase is over, a shortened form can be created and distributed less frequently, to reduce the reporting burden on respondents. The evaluation team also plans to satisfaction add items to the feedback form and add a question to learn why participants are not engaging in alternative therapy.

- **Why:**

- **Action:**

### SUMMARY

Communication at the end of the evaluation

- ✔ Share report outlines
- ✔ Ask reflective questions about reports
- ✔ Link evidence with conclusions & recommendations
- ✔ Document suggestions for future evaluations
GOOD COMMUNICATION IS ESSENTIAL!

- Clarity of expectations
- Stakeholder buy-in
- Utility of findings

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