

Evaluating for Positive Impact

Brad Cousins, Ph.D.

University of Ottawa, Ottawa

Contact: **bcousins@uottawa.ca**

:
*Canadian Association of Student Financial Aid
Administrators*
Montréal, May 30, 2018



uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

Icebreaker Activity



- From what part of Canada are you based?
- How many staff are in your financial aid and awards unit?
- What is your role in the workplace?
- Have you personally ever been part of conducting an evaluation, or planning for an evaluation?
- Has your unit ever carried out an evaluation of a financial aid/award service or education program or project?
- In your organization, how important is it for your unit to demonstrate productivity? How do you go about doing that?



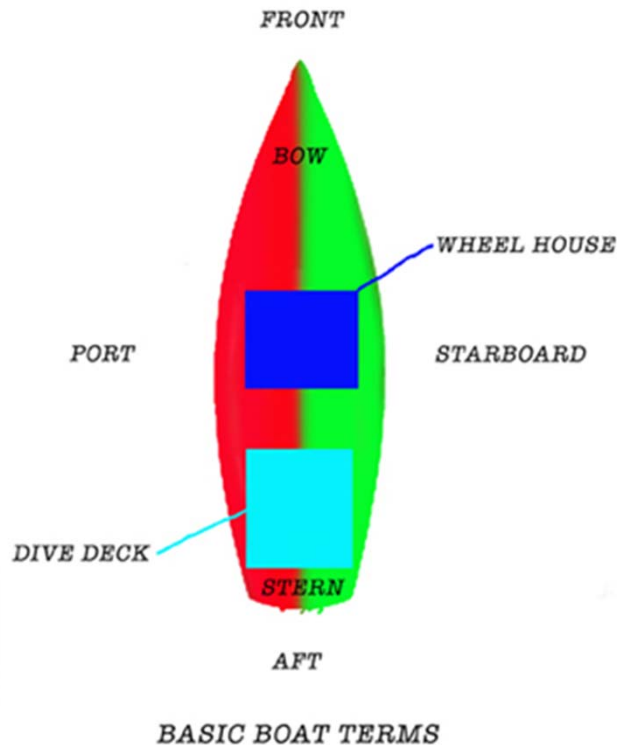
Overview



- Evaluation: basic terms and concepts; pro standards; logic models
- Evaluation designs; data collection, analysis, interpretation
- Reporting findings; enhancing use; practical resources



Basic terms



- Evaluation
 - Systematic inquiry to **judge** [programme] merit, worth, significance
- Monitoring
 - Systematic inquiry to **describe** [programme] performance



uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

Basic Terms

- Systematic inquiry
 - Planning and framing; instrument development/validation; data collection, analysis, interpretation; reporting and follow up
- Judgement
 - Compare data collected against...
 - Other group (control or comparison)
 - Baseline (pre-test, posttest)
 - External standard (benchmark, programme logic)



Basic Terms



- Evaluation functions



Basic Terms



- Evaluation approaches
 - Conventional
 - Formative evaluation
 - Summative evaluation
 - Innovative
 - Developmental evaluation



Standards of Professional Evaluation Practice

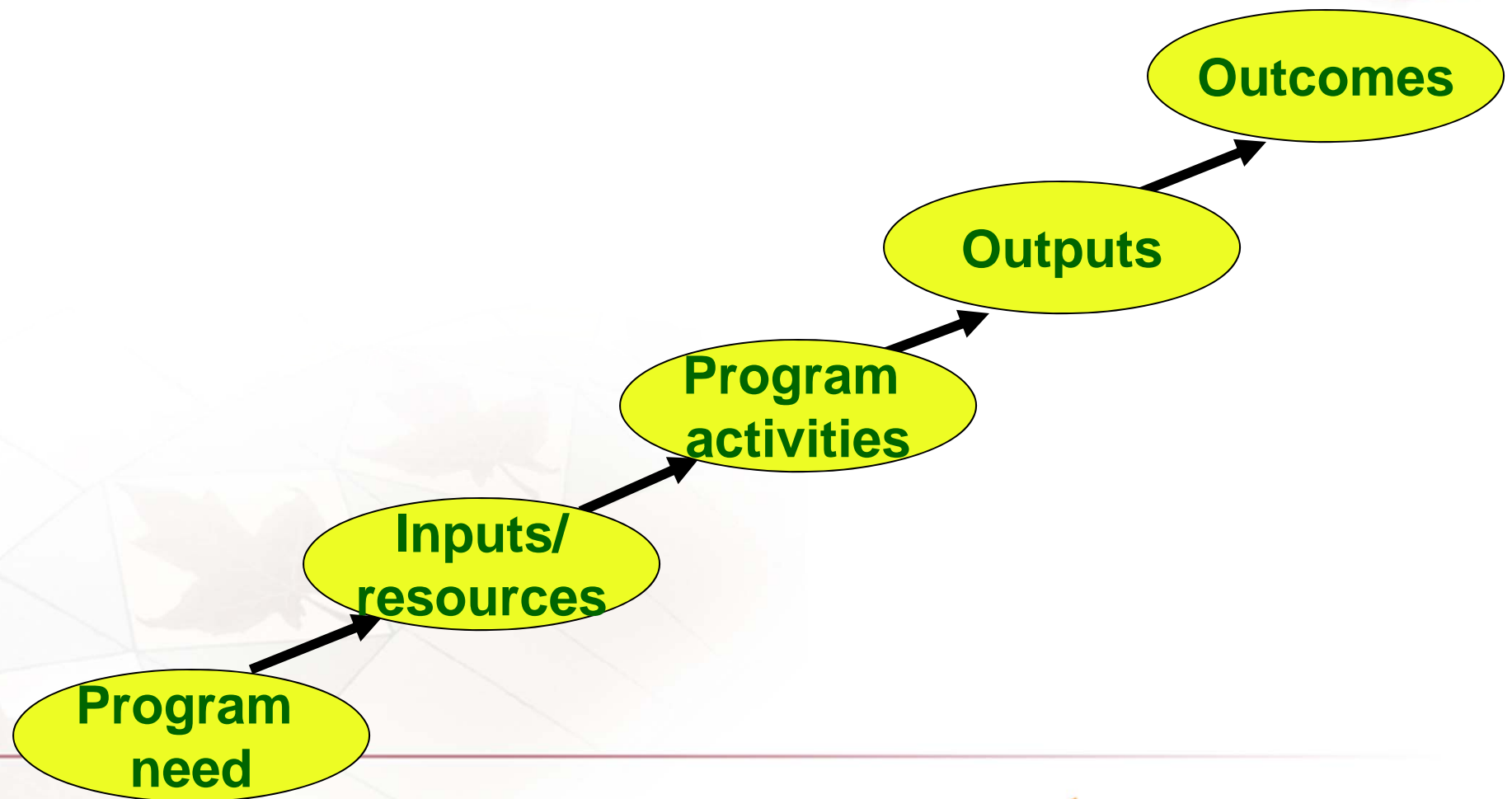


JCEE Program Evaluation Standards

- Utility
- Propriety
- Accuracy
- Feasibility
- Accountability



Program logic models



uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

Program logic models



- **Needs:** *Raison d'être* for the program. The problem to be solved
- **Inputs:** Human, fiscal and other resources (e.g., partnerships, infrastructure) needed to run the program
- **Activities:** all action steps needed to produce program outputs (e.g., recruitment, induction, delivery, streaming, exit)
- **Outputs:** goods and services generated by the program (necessary but insufficient conditions required to realize program outcomes; quantifiable)
- **Outcomes:** link to program objectives; short-term or immediate, intermediate, long term effects; changes in behaviour

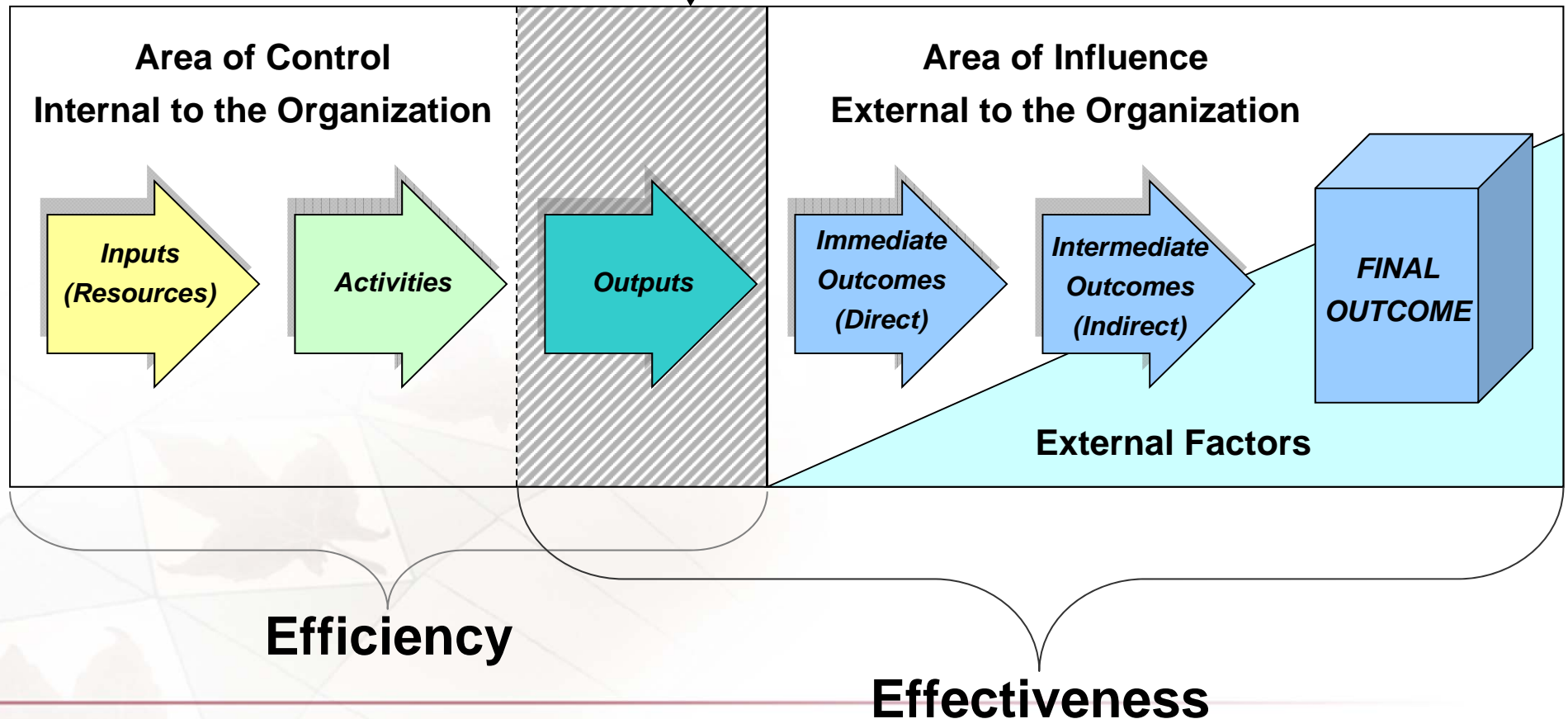


**‘Results Chain’
Logic Model**

**Implementation
evaluation**

Process evaluation

**Impact
evaluation**



uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

Training/education outcomes



1. Satisfaction
2. Learning
3. Context
4. Transfer of learning to practice



uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

Activity 1: Logic Model



1. Select a program or service
2. Develop a logic model
 - Resources
 - Activities
 - Outputs
 - Outcomes (immediate, short, long-term)
3. How will you measure outcomes?



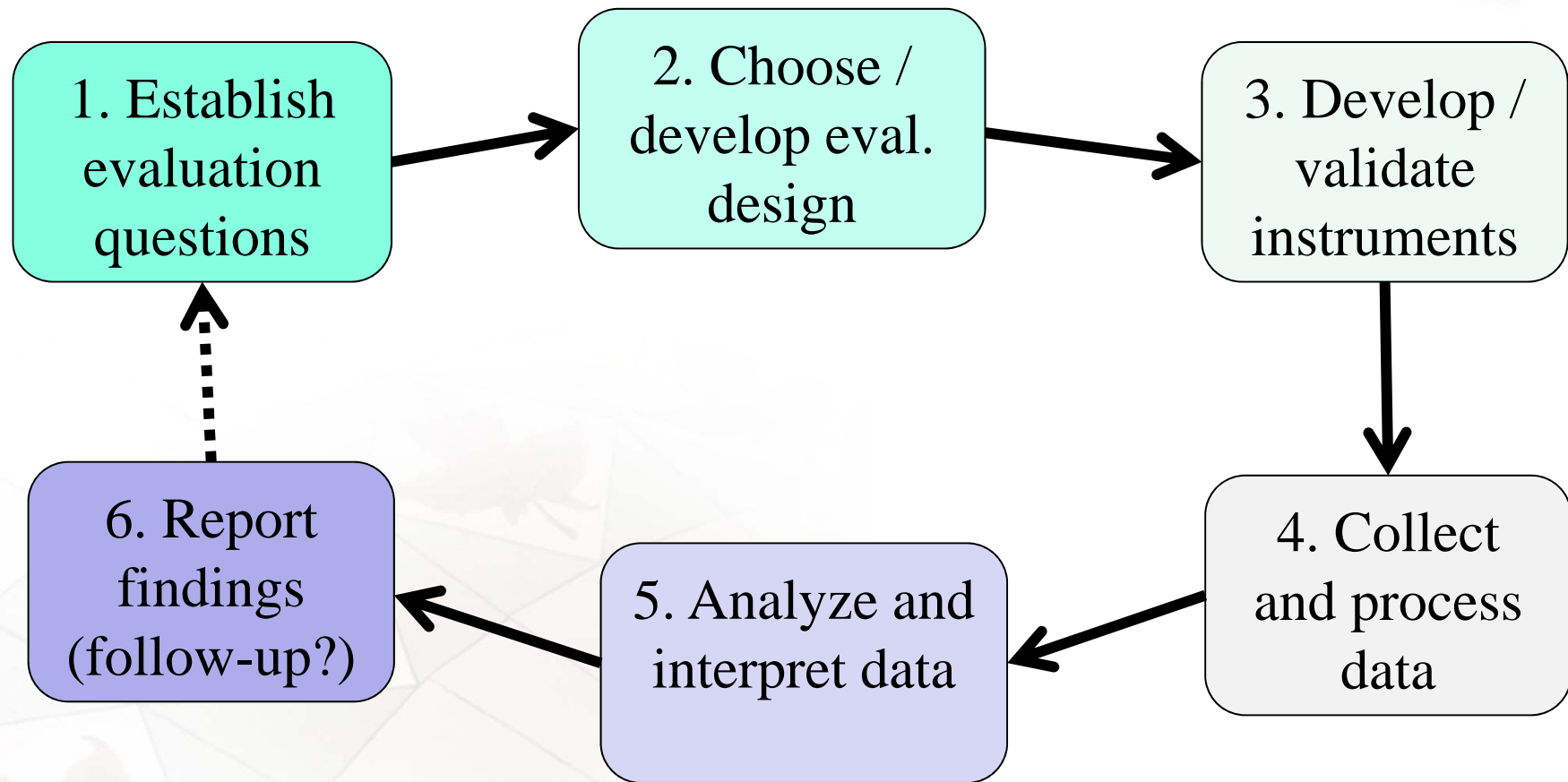
uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

Evaluation Methodology



uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

1. Establish evaluation questions



- Who are the stakeholders?
- What is their interest / stake in the program and its evaluation?
- To which questions do they want answers?



2. Evaluation Design



- Comparison groups?
 - Yes, no, hybrid
- Longitudinal data collection?
 - Yes, no, hybrid
- Mixed methods?
 - Simultaneous/parallel
 - Sequential (quant→qual **OR** qual→quant?)



uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

Quant vs. Qual Methods



	Quantitative	Qualitative
Typical goals	Impact eval.	Rich description
Ideal design	RCT	Ethnographic
Approach	Pre-ordinate	Emergent
Criteria	Objectivity	Depth of analysis
Reporting	Impersonal	Narrative
Strengths	Replication / tests	Grounded knowledge
Limitations	Meaning, flexibility	Replicability; labour intensive



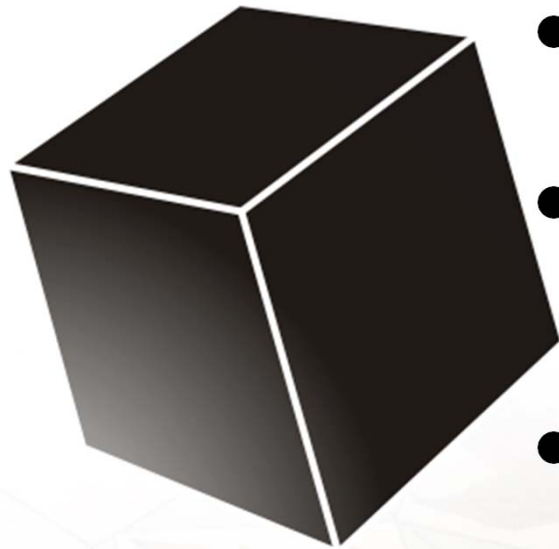
2. Evaluation design



- Quantitative
 - Comparison, survey
- Qualitative
 - Comparison, in-depth inquiry
- Mixed-method
 - Methodological eclecticism, sequencing, justifications



Black box designs



- One shot, post only
 - X O1
- Comparative post only
 - X O1
 - O2
- Randomized control trial (gold standard)
 - R X O1
 - R O2



uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

Program theoretic designs



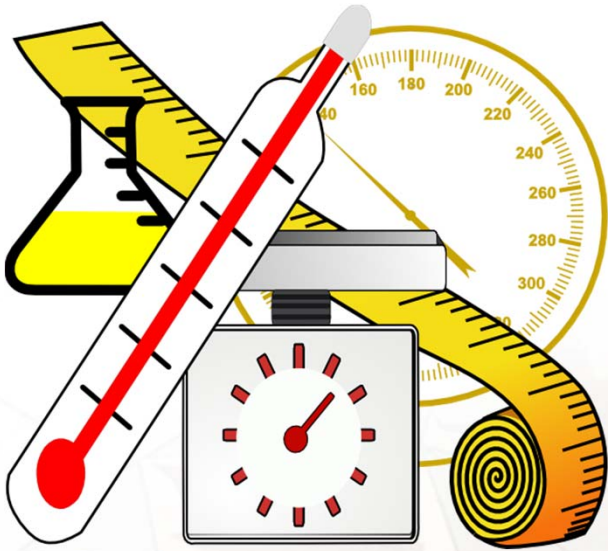
Logic model / results chain

- Low fidelity – Grey box design
- High fidelity – Glass box design

CONTRIBUTION VS.
ATTRIBUTION



3. Instruments



- Borrow/adapt or develop from scratch?
- Adhere to principles of instrument development
 - Content coverage, burden, clarity/reliability, cultural sensitivity, non-leading
- Validate
 - Content review, face validity, pilot test



4. Data collection

- Determine data sources
- Decide sample
 - Size, scope, obtrusiveness
 - Representative, key informant
- Standardize data collection
 - Ethical considerations
- Process, clean and organize/store data for analysis



5. Data analysis



- Quantitative
 - Descriptive, bivariate, multivariate
- Qualitative
 - Content analysis; emergent vs pre-ordinate
- Use of data display
 - Graphs, tables, charts
- Tell the story, answer the questions



Quality Checklist



- Are we asking fair, comprehensive and justified questions?
- Does the design fit the purpose?
- Have we taken reasonable steps to ensure data quality?
- Have we told a coherent, believable story?



Activity 2: Thinking about your evaluation plan



- Identify and discuss strategies for the evaluation of the program logic model you developed in Activity 1
 - Design
 - Instruments
 - Data collection



uOttawa

Centre for Research on Educational
and Community Services



Centre de recherche sur les services
éducatifs et communautaires

Recommendation writing



- Recommendations vs issues for consideration
- Good Practice:
 - Stakeholder input
 - Keep true to data
 - Realistic/Neutral
 - Action oriented/concrete
 - Provide options
 - Summarize support



RECOMMENDED



Evaluation Outputs



- Products of evaluation
 - Content tailored to information needs of identified users
 - Timely delivery
 - Good communication quality
 - Credible evidence that resonates with user community



Use of Findings



- Instrumental
 - Support of discrete decisions (programme changes, program resource allocation)
- Conceptual
 - Educative value of evaluation (learning about programme strengths, weaknesses, power, viability, fit with context, etc.)
- Symbolic / persuasive / legitimative
 - Compliance with accountability demands



-

Process Strategies to Enhance Use



- Consultation on critical elements
 - Programme logic model
 - Instrument development and validation
 - Data collection / analysis
- Share preliminary findings
 - Solicit interpretations and implications
- Tailored reporting
 - Multiple versions? Practical and feasible recommendations



End View Strategies to Enhance Use



- Data use leads to data valuing
 - Belief follows practice
 - Demand side needs to experience successful use of evaluation (conceptual, process use)
- Pressure and support
 - Pressure to focus on evaluation
 - Identification and celebration of benefits
- Integration of evaluation into decision culture
 - evaluation habits of mind





Accountability



Learning



uOttawa

Centre for Research on Educational
and Community Services

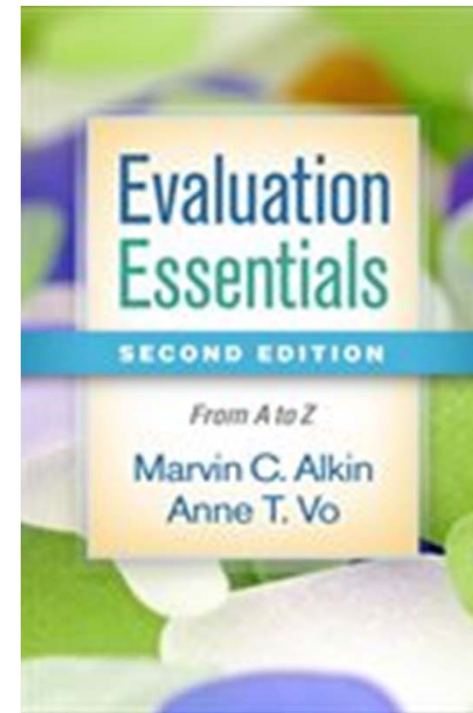


Centre de recherche sur les services
éducatifs et communautaires

Practical Resources



- Evaluation associations / pro standards
- Logic models
- Handbooks/toolkits
- Technical resources
- Videos



Activity 3: Anticipating and addressing evaluation challenges



- Identify and discuss challenges for your organization/unit to planning and implementing evaluations of your financial services and education programs.
- What are some potential solutions?



