

Effective Reporting: A Vital Element to Sound Evaluations

Arlen Gullickson

Frances Lawrenz

Dale Farland

At Issue

Preparing and presenting evaluation findings in ways that will be received, “heard,” and used effectively is often a daunting task.

Sound reporting includes substantial elements of follow up, negotiation, and persuasion

Plato may have said these things. If so, his report was misplaced.

Presentation Organization

- ◆ Evaluation context
- ◆ The program evaluation standards as an organizer
- ◆ Example Reporting Strands
- ◆ Report Exemplars

Context: General

- ◆ Client: National Science Foundation (NSF) Research, Evaluation and Communication (REC) Division
- ◆ Evaluation Object: Advanced Technological Education Program (ATE)
- ◆ Grant rather than contract
- ◆ Large scale (2.5M)
- ◆ Long term (6 years)
- ◆ Commenced in 1999



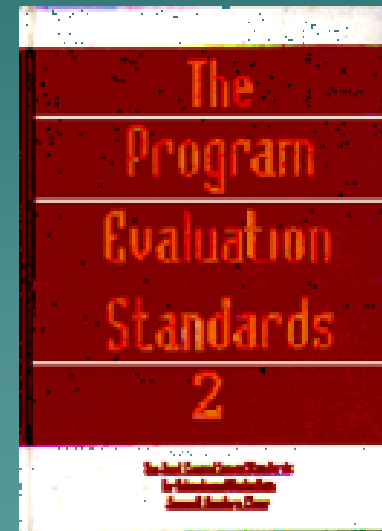
Object: Advanced Technological Education (ATE) program

- ◆ Promotes improvement in technological education
- ◆ Undergraduate and secondary school levels
- ◆ Supports curriculum development; the preparation and professional development of college faculty and secondary school teachers; internships and field experiences for faculty, teachers, and students; and other activities
- ◆ Emphasis on two-year colleges, the program focuses on the education of technicians for the high-technology fields that drive our nation's economy

The Program Evaluation Standards

A Focus on Utility

- ◆ U1 Stakeholder Identification
- ◆ U3 Information Scope and Selection
- ◆ U5 Report Clarity
- ◆ U6 Report Timeliness and Dissemination
- ◆ U7 Evaluation Impact



U1 Stakeholder Identification

NSF-REC	Project accountability
NSF-ATE	Program support, improvement, and accountability
Funded projects	Project improvement
STEM educators	Project planning ideas
Congress	Program and constituency accountability

U3 Information Scope and Selection

- ◆ Project data and report elements are determined via interaction with NSF staff and ATE project principal investigators.
- ◆ Annual Web-based survey -- Broad, overarching issues
- ◆ Site Visits, observations, interviews, special surveys—Targeted studies

U5 Report Clarity

- ◆ Fit report media to stakeholders
- ◆ Use multiple methods
- ◆ Partition reports to serve identified needs
- ◆ Key reports to specific audiences
- ◆ Employ stakeholder reviews

U6 Timeliness and Dissemination

- ◆ Multiple report methods (e.g., 6 for one survey)
- ◆ Pre plan/organize (e.g., on-line item report)
- ◆ Vary report type by audience (e.g., tri-fold brochure)
- ◆ Use interesting physical objects to lure stakeholders to your reports (e.g., bookmarks)

U7 Increasing Impact

- ◆ Delimit information presented
- ◆ Ensure relevance of information to stakeholders
- ◆ Choose information packaging carefully
- ◆ Deliver in multiple ways
- ◆ Engage the recipient in personal ways

Exemplar Reporting Strands

- ◆ Annual Survey
- ◆ Targeted Investigation – Sustainability

Annual Survey Report Tools (in order created)

- ◆ On-line item summary
- ◆ Fact Sheet
- ◆ Full report
- ◆ Executive summary
- ◆ On-line data viewer (OLAP)
- ◆ PowerPoint

Special Topics

Issue Papers (9)
Executive Summaries
Issues at a Glance
Monograph
Journal Publication

**Metaevaluation
Report**

Special Topic--Sustainability

- ◆ Tri-fold brochure
- ◆ PowerPoint Presentation
- ◆ PI Conference presentation
- ◆ Video Conference
- ◆ Electronic Synthesis

Stakeholder-Accountability Purposes

Group	Survey	Targeted Study
REC	Fact Sheet Exec Summary Full report	Exec Summary Full report
ATE	OnLine Item S. Fact Sheet Exec Summary Full report	Exec Summary Full report

Stakeholder-Development Purposes

Group	Survey	Targeted Study
ATE	Full Report	Full Report
Projects	Exec Summary Power Point Full Report	On-Line Item Brochures, Exec Summary Elec. Pub
STEM	Exec Summary Full Report OLAP	Monograph, Journal, Exec Summary, Electronic

On-Line Item Summary

- ◆ Web-based
- ◆ Immediate upon close of survey
- ◆ Restricted to NSF staff and PIs
- ◆ Information tailored to PI
- ◆ Data not vetted

GPRA and Project Planning

On-Line Item Summary Screen Capture

Collaboration - Netscape

Collaboration with Other Institutions or Groups

1. Non-NSF funding and in-kind support.

I. Please CHECK FOR ALL APPLICABLE INSTITUTIONS in b-f, if you received MONETARY SUPPORT in the last 12 months (including project cost sharing).

a. O(47) This question is Not Applicable
 b. X(41) Center/Project institutions (The institutions that are the primary participants in the work of the center/project and the primary recipients of center/project funds)
 c. X(26) Business and industry
 d. O(27) Public agencies (local, state, federal)
 e. O(29) Educational institutions
 f. X(10) Other organizations

II. Please CHECK FOR ALL APPLICABLE INSTITUTIONS in b-f, if you received IN-KIND support (non-monetary support [e.g., equipment]) in the last 12 months.

a. O(18) This question is Not Applicable
 b. O(57) Center/Project institutions (The institutions that are the primary participants in the work of the center/project and the primary recipients of center/project funds)
 c. O(71) Business and industry
 d. X(35) Public agencies (local, state, federal)
 e. X(63) Educational institutions
 f. X(19) Other organizations

III. Total for the last 12 months. Please provide the approximate amount of total monetary and in-kind support that your center/project has received in the past 12 months from all the non-NSF sources you identified. Estimate dollar amounts to the nearest \$1,000. Please enter only numbers (no "\$", commas, or periods). If the information is Unavailable enter "U".

Description	Dollars
a. Total for last 12 months of monetary support	1000(90590.73)
b. Total for last 12 months of in-kind support	2000(85526.92)

2. With how many institutions EXTERNAL to your project/center has your center/project established collaborative arrangements that involve support (contributions of time, personnel sharing, equipment, etc.) and approximately how many persons from these institutions collaborate? Please specify for each type of institution listed below. For collaborators that offer their time, include only those that have spent a minimum of two days per year working with your center/project. * If the information is Unavailable enter "U"

Types of collaborating institutions	# of Institutions	# of Persons
a. Business and industry	1000(7.49)	2000(14.04)
b. Public agencies (local, state, federal)	u(1.92)	4000(4.65)
c. Educational institutions	5000(9.40)	u(22.88)
d. Other organizations	7000(2.05)	8000(4.85)

3. For each of the institution types 1-4, please check ALL THE COLLABORATION PURPOSES THAT APPLY for your center's/project's collaborative

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On-Line Data Viewer OLAP

- ◆ Web-based
- ◆ Publicly available
- ◆ Data Manipulation tools prepackaged
- ◆ Research Orientation
- ◆ Data fully vetted

On-Line Screen Capture

The screenshot shows a Netscape browser window with the title 'a. Professional Development Opportunities - Netscape'. The page has a red header with the 'ATE Program Evaluation Project' logo and navigation links for 'ATE-Project', 'HOME', and 'LOG OUT'. The main content area is titled 'a. Professional Development Opportunities' and includes a 'Table of Contents' with links to 'OLAP Cubes' and 'Professional Development Opportunities'. Below this is a filter section for 'Professional Development Opportunities' with dropdown menus for Survey Year, Funding Category, Institution Category, Funding Quartile, and Age Category, all set to 'Total'. A data table follows, listing various opportunity types with their counts, means, standard deviations, and percentages of the total survey.

ATE-Project HOME LOG OUT

ATE Program Evaluation Project

[a. Professional Development Opportunities](#) | [<< Back to Category](#)

Created by Chris L. Coryn on 2003.07.30 11:59:32 AM

Table of Contents:

- [OLAP Cubes](#)
- [Professional Development Opportunities](#)

[\[Hide Table of Contents Test Link\]](#)

Professional Development Opportunities

Survey Year: Total

Funding Category: Total

Institution Category: Total

Funding Quartile: Total

? Age Category: Total

	N	Mean	Std. Deviation	% of N in Survey Year
Number of Conference Opportunities	180	2.95	3.558	100.0%
Number of Short-Term Workshop Opportunities	223	5.77	12.202	100.0%
Number of Inservice Course/Seminar Opportunities	163	3.86	9.404	100.0%
Number of Internship, Leave of Absence to Work in Industry, or Work Exchange Opportunities	112	2.22	6.221	100.0%
Number of Online Course Opportunities	87	5.06	26.360	100.0%
Other Opportunities	52	10.81	18.073	100.0%
Total Number of Professional Development Opportunities	281	13.16	26.099	100.0%

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Electronic Synthesis

- ◆ Used Full Report as Framework
- ◆ Use a video conf. reporting context to enhance the full report.
- ◆ Incorporates others (presenters)
- ◆ Provides audio and video via hyperlinks
- ◆ Adds interest, personal emphases, nuances
- ◆ Hopefully, here is how it works

The End

Visit our Web site at

<http://www.wmich.edu/evalctr/ate/>

Fact Sheet

- ◆ Approximately 2-weeks following close of survey
- ◆ One to 3 pages – Survey Highlights
- ◆ Restricted to NSF program officers
- ◆ Data minimally vetted

GPRA and Program Planning

Full Report

- ◆ 2 to 3 months following survey close
- ◆ Preparation includes substantial interaction with NSF staff
- ◆ Extensive Report (e.g., 50 pages of text and tables) – Well documented
- ◆ NSF staff, project staff, and interested others

Program Development and Accountability,
Project development

Executive Summary

- ◆ In tandem with full report
- ◆ Most carefully vetted of all reports
- ◆ NSF ATE staff, project staff, interested others, and NSF REC staff
- ◆ Brief -- addressing key indicators, conclusions and recommendations

Accountability, program development

Test



Tom Bailey Definition of Sustainability