

# Effective Reporting: A Vital Element to Sound Evaluations

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# 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



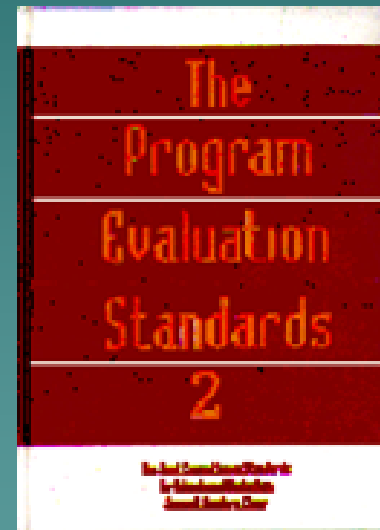
# Object: Advanced Technological Education (ATE) program

- ◆ 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

<b>NSF-REC</b>	Project accountability
<b>NSF-ATE</b>	Program support, improvement, and accountability
<b>Funded projects</b>	Project improvement
<b>STEM educators</b>	Project planning ideas
<b>Congress</b>	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	<b>Fact Sheet</b> <b>Exec Summary</b> Full report	<b>Exec Summary</b> Full report
ATE	OnLine Item S. <b>Fact Sheet</b> <b>Exec Summary</b> Full report	<b>Exec Summary</b> Full report

# Stakeholder-Development Purposes

Group	Survey	Targeted Study
ATE	<b>Full Report</b>	<b>Full Report</b>
Projects	<b>Exec Summary</b> Power Point Full Report	On-Line Item <b>Brochures,</b> Exec Summary Elec. Pub
STEM	<b>Exec Summary</b> 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**

start Novell Group... Presentation1 WordPerfect ... 3 Netscape 11:12 AM

# 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 header features 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'. A filter section allows users to select 'Survey Year', 'Funding Category', 'Institution Category', 'Funding Quartile', and 'Age Category', all currently set to 'Total'. Below the filters is a table with the following data:

	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%

The browser's taskbar at the bottom shows the Windows Start button and several open applications: Mail, WordPerfect, 2004 Survey, 2 Win..., and the current Netscape window. The system clock indicates 10:46 AM.

# 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