Checklists for Evaluation

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http://www.wmich.edu/evalctr/2010/06/daniela-schroter-ph-d/

The Evaluation Center
Western Michigan University
Slide content has been prepared with help from Jason T. Burkhardt

Overview

Definitions and characteristics

Types of checklists

Purposes

Opportunities for use

Advantages and disadvantages of use
Definition & Characteristics

A checklist is an organized tool that outlines criteria of consideration for a particular process. It functions as a support resource by delineating and categorizing items as a list—a format that simplifies conceptualization and recall of information.

(Hales et al., 2007, p. 22)

Types of Checklists

Laundry

ALL OUT OF

<table>
<thead>
<tr>
<th>Snaks</th>
<th>Paper &amp; Wrap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheese</td>
<td>Toilet Paper</td>
</tr>
<tr>
<td>Veggie</td>
<td>Paper Towels</td>
</tr>
<tr>
<td>Olive</td>
<td>Napkins</td>
</tr>
<tr>
<td>Soy</td>
<td>Aluminum-Foil</td>
</tr>
<tr>
<td>Peanut-Butter</td>
<td>Plastic-Wine</td>
</tr>
<tr>
<td>Muesli</td>
<td>Plastic-Bags</td>
</tr>
<tr>
<td>Curry</td>
<td></td>
</tr>
</tbody>
</table>
Types of Checklists

Is this list strongly or weakly sequential?

Types of Checklists

Laundry
Sequential

Iterative

Surgical Safety Checklist (Part Ears)

Before induction of anesthesia
Before skin incision
Before patient leaves operating room

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 2</th>
<th>Stage 3</th>
<th>Stage 4</th>
</tr>
</thead>
</table>
| Prepare Sauna Chairs
- Chair
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<table>
<thead>
<tr>
<th>Table 1</th>
<th>Table 2</th>
<th>Table 3</th>
<th>Table 4</th>
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| Prepare Sauna Chairs
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The checklist must be completed in full. Assistance and coordination to fulfill tasks are encouraged.

9/9/2010 Presentation at the Conference of the Norwegian Association of Evaluation and EVA-Forum
Types of Checklists

- **Iterative**
- **Diagnostic**
- **Sequential**

### Criteria of Merit

<table>
<thead>
<tr>
<th>Criteria of Merit</th>
<th>Iterative</th>
<th>Diagnostic</th>
<th>Sequential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artistic quality</td>
<td>0 0</td>
<td>0 0</td>
<td>0 0</td>
</tr>
<tr>
<td>Content accuracy</td>
<td>0 0</td>
<td>0 0</td>
<td>0 0</td>
</tr>
<tr>
<td>Cultural relevance</td>
<td>0 0</td>
<td>0 0</td>
<td>0 0</td>
</tr>
<tr>
<td>Educational value</td>
<td>0 0</td>
<td>0 0</td>
<td>0 0</td>
</tr>
<tr>
<td>Entertainment value</td>
<td>0 0</td>
<td>0 0</td>
<td>0 0</td>
</tr>
<tr>
<td>Emotional impact</td>
<td>0 0</td>
<td>0 0</td>
<td>0 0</td>
</tr>
<tr>
<td>Historical value</td>
<td>0 0</td>
<td>0 0</td>
<td>0 0</td>
</tr>
<tr>
<td>Inspirational value</td>
<td>0 0</td>
<td>0 0</td>
<td>0 0</td>
</tr>
</tbody>
</table>

### Reasons to suspect ADHD

- Your child is not able to control impulsive or aggressive behavior, which are causing relationship problems.
- Your child is performing poorly in school due to inability to concentrate, focus, or sit still.
- The symptoms occur in many different situations.
- You have tried other treatments such as behavior therapy, but they have not helped.

### Reasons not to suspect ADHD

- The symptoms are sporadic and do not interfere with daily living or relationships.
- Your child is performing at or near grade level.
- The symptoms occur only in some situations (e.g., only at home, or only at school).
Example Checklists for Evaluation
http://www.wmich.edu/evalctr/checklists/

Evaluation Management

- Dan Stufflebeam
  - Plans & Operations
  - Evaluation Contracts
  - Evaluation Design

- Jerry Horn
  - Budget Development Checklist

- Roberts Stake
  - Negotiating Agreements

- Arlen Gullickson & Dan Stufflebeam
  - Evaluation Feedback Workshops

- Gary Miron
  - Evaluation Reports

- Paula Gangopadhyay
  - Making Evaluation Meaningful to All Education Stakeholders
Evaluation Models

- Daniel Stufflebeam
  - CIPP Model
- Egon Guba & Yvonne Lincoln
  - Constructivist Evaluation
- Ernest House & Kenneth Howe
  - Deliberative Democratic Evaluation
- Michael Scriven
  - Key Evaluation Checklist
- Michael Quinn Patton
  - Qualitative Evaluation
  - Utilization Focused Evaluation

Evaluation Values & Criteria

- Daniela Stufflebeam
  - General Values and Criteria
  - Research and Development Centers (Draft)
- Michael Scriven
  - Duties of the Teacher
  - Educational Products
- Catherine Awsumb Nelson, Jennifer Post, & Bill Bickel
  - Institutionalization of Technology in Schools
- Lorrie Shepard
  - Large-Scale Assessment Programs
MetaEvaluation

- Daniel Stufflebeam, Leslie Goodyear, Jules Marquart, & Elmima Johnson
  - AEA Guiding Principles
- Daniel Stufflebeam & Diana Pullin
  - Legal Viability of Personnel Evaluation
- Daniel Stufflebeam
  - Personnel Evaluations
  - Personnel Evaluation Systems
  - Program Evaluations (Short & Long Version)
  - Program Evaluation Models

Evaluation Capacity Building/Institutionalization Checklists

- Boris Volkov & Jean King
  - Evaluation Capacity Building
- Daniel Stufflebeam
  - Institutionalizing Evaluation
Checklist Creation Checklists

- Daniel Stufflebeam
  - Checklist Development
- Barbara Bichelmeyer
  - Checklist for Formatting Checklists

Evaluation Checklists Developed via Dissertation Research

- Nadini Persaud
  - Cost Analysis (2007)
- Wes Martz
  - Organizational Effectiveness (2008)
- Daniela Schröter
  - Sustainability Evaluation (2008)
Opportunities for Use

- Evaluation planning and design
- Proposal writing
- Reporting
- Management
- Metaevaluation
- Program planning
- And other major tasks

Advantages & Disadvantages of Checklist Use

- Consolidate vast knowledge in a parsimonious manner
- Improve task performance
- Reduce influence of halo and Rorschach effects
- Reduce resource use
- Overuse (fatigue)
- Unnecessary barriers
- Tunnel vision
- Inappropriate use
Do you have any questions, comments, or concern?

Thank you!

Please feel free to contact me with any suggestions and ideas regarding evaluation checklists.

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