LUNCH & LEARN SERIES
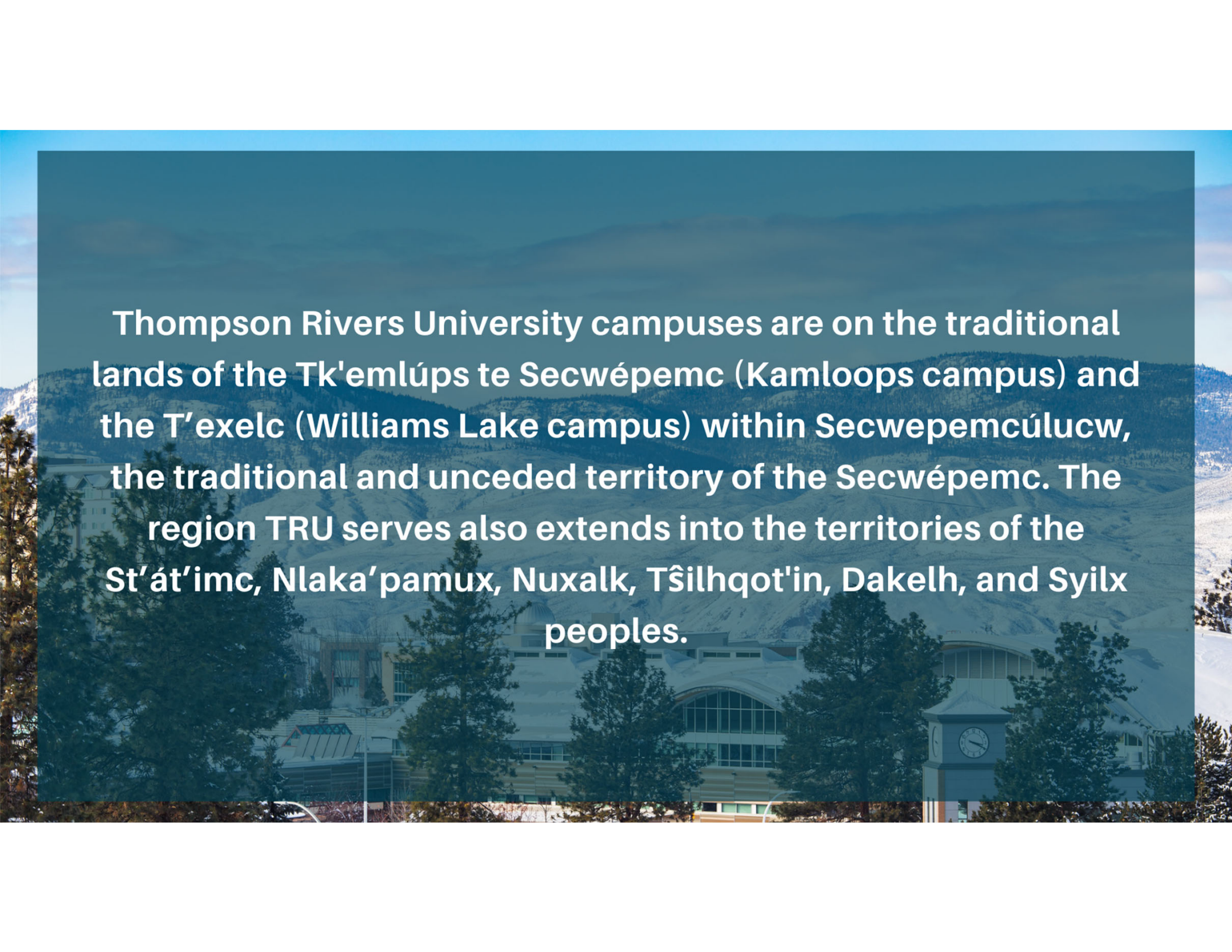
GENERAL INTRO TO PROJECT EVALUATION:
Part 2

THOMPSON RIVERS UNIVERSITY | Integrated Planning & Effectiveness

Thompson Rivers University campuses are on the traditional lands of the Tk'emlúps te Secwépemc (Kamloops campus) and the T'exelc (Williams Lake campus) within Secwepemcúlucw, the traditional and unceded territory of the Secwépemc. The region TRU serves also extends into the territories of the St'át'imc, Nlaka'pamux, Nuxalk, Tŝilhqot'in, Dakelh, and Syilx peoples.

Housekeeping
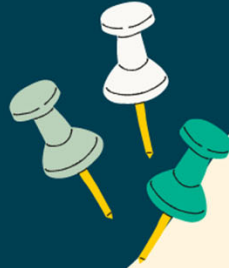
- This is a hybrid meeting
- 45 minutes for content and 15 minutes for Q&A
- To be inclusive of all our attendees, please identify yourself when you speak
- Session materials will become available after the session via email; the recordings will be available by the end of January
- Available to stay after the workshop for any questions
- Book a follow-up meeting with us to chat more about your project

Agenda

- What is an evaluation plan?
- Developing your project evaluation plan
- Different types of methodologies
- Developing metrics

Evaluation Plan Structure *(Example)*

- Introduction
  - Project overview
  - Purpose of evaluation, how findings will be used and by whom
  - Brief explanation of who is conducting the evaluation
- Logic Model   *Part 1*
- Evaluation questions   *Part 2*
- Data collection and analysis methods
- Timelines and deliverables
- Reporting & Distribution   *Part 2*

General Foundations of the Evaluation Plan

- developed before you begin your evaluation;
- is consistent with the available evaluation resources and agreed evaluation objectives;
- focuses on the most important types of information to know (i.e., need to know rather than nice to know);
- does not place undue burden on project / program staff or participants;
- is ethical and culturally appropriate.

Source: BetterEvaluation (2022).
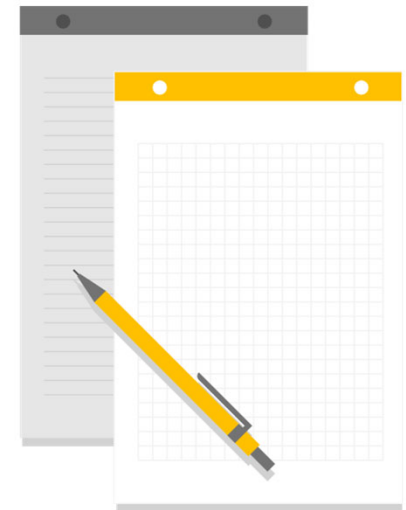
Evaluation Planning

1 Defining Success

2 Evaluation Questions

3 Evaluation Design

4 Data Collection Methods

5 Metrics

6 Reporting
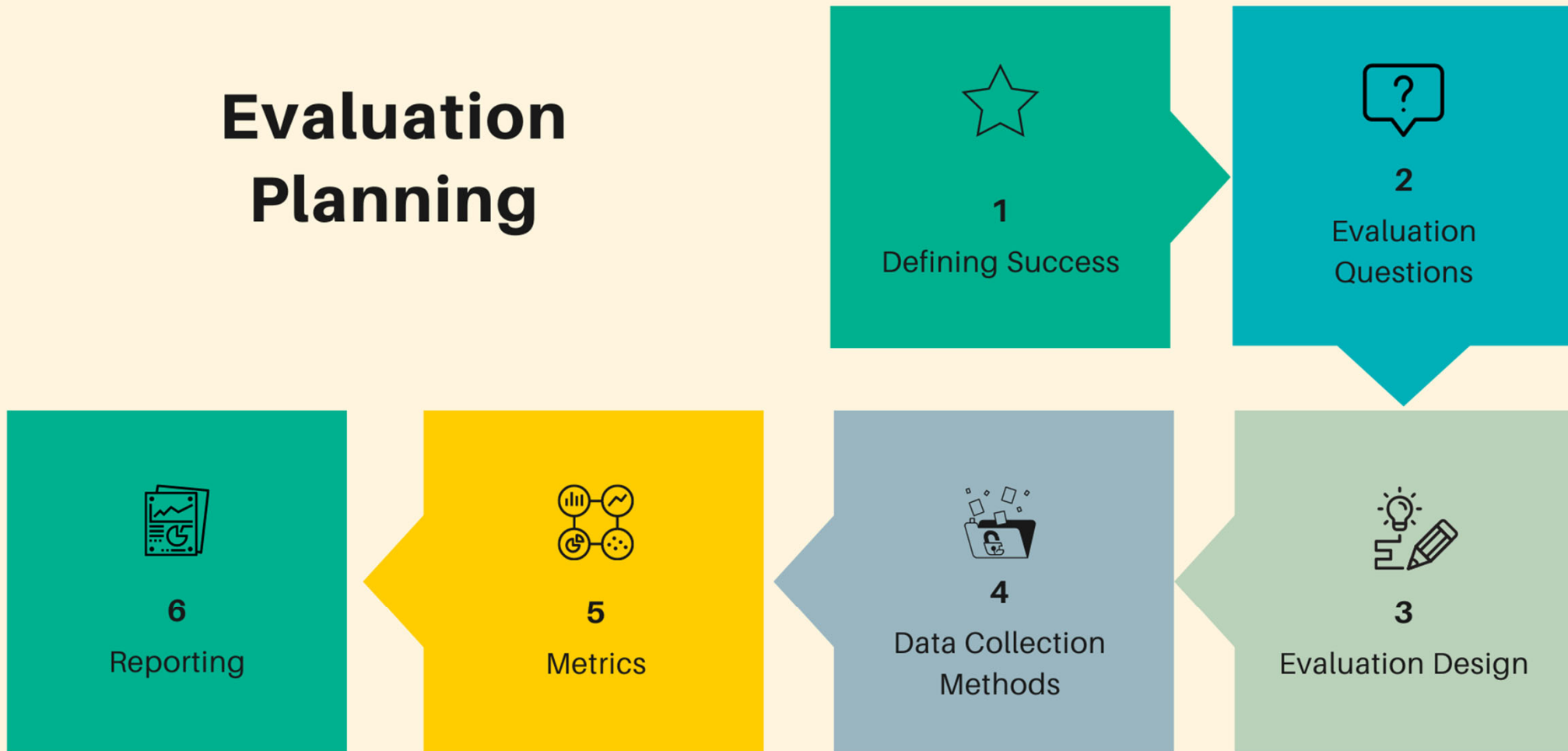
Defining Success

❑ What success looks like: *criteria* and *standards*

Question: Do students who participate in the summer sustainability program demonstrate improved sustainability literacy over the course of the summer?

Criterion: An aspect, quality of characteristic of what your project attempts to achieve.

Students demonstrate improved sustainability comprehension

Standard: Standards refer to the levels of performance required for each of the criteria.

75% of participating students achieve a higher score on sustainability comprehension assessment in September as compared with May

Strong Evaluation Questions

- *Appropriate*: Align with evaluation purpose, definitions of success, context, and resources

- *Answerable*: Can be answered with data, sufficiently specific

- *Timely*: Align with evaluation and decision-making time frames

- *Informative*: Provide new insight, not leading or predetermined

- *Evaluative*: Determine merit or worth

Types of Evaluation Questions

Effectiveness
To what extent do participants gain _____ over the course of the intervention?

Design (and implementation of that design)
To what extent was the design of the intervention appropriate to meet the identified needs?

Relevance
How relevant is the project and its activities to the needs, priorities, and/or interests of participants and communities?

Sustainability
To what extent were program effects sustained over time?

Resource Use
In what ways could the intervention use its resources more efficiently?

Equity
In ways were culture, language, or race considered in the development of the intervention?

Consequence
What level of benefit does the project yield to participants or the community?

Replicability
To what extent can intervention activities be duplicated in other contexts?

Alignment
In what ways is the intervention consistent with community or funder priorities?

Experience
What is the level of satisfaction among program participants? Are there differences among different sub-groups of participants?

Unintended Effects
What negative consequences (if any) are associated with the project? How did those consequences arise and how they might they be mitigated?

Evaluation Questions vs Data Collection Questions

Evaluation questions	Data collection questions
High level questions evaluation is designed to answer	Used to collect data to answer evaluation questions
2-5 questions that address the definitions of success	Dozens of survey questions, interview questions, etc. that gather a range of data
Provide direction and focus to evaluation Guide what data to collet and how to analyze that data	

Evaluation and Research Designs

- Evaluation Design ≠ Research Designs
- Evaluation design is driven by the evaluation questions and measurement process.
- You'll need a combination of methods and processes for different aspects of the evaluation.

Experimental

- Randomised control trial

Quasi-experimental

- Case comparison groups

Non-experimental

- Pre- and post-test studies
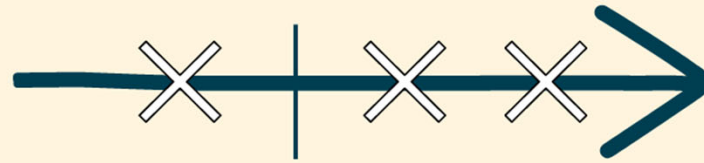- Case studies

Qualitative, quantitative, mixed methods

Pre/post

Pre/follow-up

Pre/post/follow-up

Longitudinal
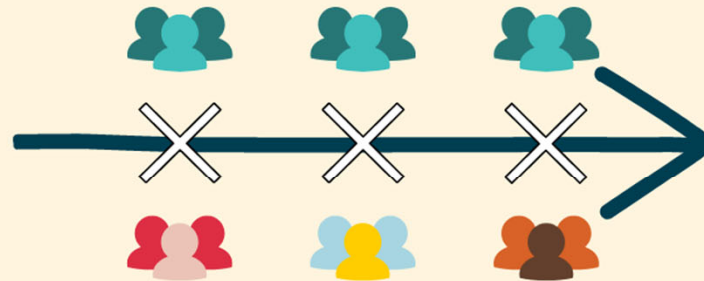
Panel

Trend

Other considerations: *Comparison groups*

Data Collection Methods

- Existing Information
  - *Documents/records*
  - *Historical data*
  - *Data about similar projects*
  - *Join us for Information & Resources available for your project evaluation!*

- New Information
  - *Documents/records*
  - *Surveys*
  - *Observations*
  - *Interviews*
  - *Focus Groups*
  - *Assessments*
    - *Rubrics*
    - *Concept maps*

Selecting Methods

1. Ability to contribute to answering the evaluation question(s)

2. Inherent strengths and limitations of the method

3. Resources and evaluation capacity

4. Suitability for the focal population and context

Cultural congruence
- Align with cultural practices and norms
- Match language and literacy practices
- Demonstrate respect
- Yield accurate, trustworthy data

5. Credibility of the information obtained using the method

Planning data collection

1. Who will administer or conduct the method?

2. Will we draw a sample and, if so, how?

3. How will the method be administered?

4. How will the instruments be designed?

5. How will the instruments and method be tested?

6. How will the data be analyzed?

Make Sure Data Fit your Analysis Needs

Summary:

❑what success looks like

❑the questions you want to answer

❑the audience for the evaluation

❑your audience(e.g. who the program is for, how many people are in the project or receive a service and what their characteristics are)

❑what data are already available

Other Considerations/Questions for Discussion with your Collaborators:
❑the maturity of your program (i.e., is it ready to evaluate outcomes or has it only just started?)
❑the type of project you are seeking to evaluate
❑ your resources (e.g. funding, staff, skills) and time frame
❑ whether you will conduct an evaluation internally or contract an external evaluator.

What do metrics do?

- Help you determine if you are reaching your goals.
- Help you decide if you need to change course and revise your plan.
- Prove progress and success to stakeholders, especially accrediting agencies and budget committees.
- Provide clear targets for people implementing the plan.
- Should inform resource allocation.
- Encourage accountability.

5
Metrics

Source: SCUP. Planning Institute Design.

How to Determine Metrics?

1. What outcomes would tell us we reached our goal?

2. How could we measure those outcomes?

3. How will we measure those outcomes?

4. What will we do with those measurements?

Source: SCUP. Planning Institute Design.

5
Metrics

Quantitative and Qualitative Metrics

5
Metrics

Quantitative: expressed through numbers.

Attendance, usage rate, staff FTE per student,

Qualitative: expressed through narratives.

Concept mapping, cultural mapping, narratives, stories.

TABLE 3 SAMPLE THEME METRIC INDICATOR

Theme-Objective	Ind-1 (Language)	IND - 2 (Culture)	IND - 3 (Environment)
Collectiveness - everyone working together to help one another.	Communication – to have open conversations in our language and share knowledge and wisdom.	Ceremonies - participation by everyone, especially our young people.	Community Events – picking medicines, helping each other to learn when and where to pick.

Source: Fox, P., & Crowshoe, E. A. (2018). Indigenous Health Indicators. A participatory approach to co-designing indicators to monitor and measure First Nations health. 36.

"Not everything that can be counted counts, and not everything that counts can be counted"

Albert Einstein

Metrics Development Consideration

5

Metrics

1. Applying a Reality Check
   - Accessibility of Data
   - Frequency of Tracking
   - Communicability of Concept

2. Mapping to Project Objectives

3. Confirming Metrics Benchmarks

4. Swapping Lagging for Leading Benchmarks

5. Ensuring Balance of Metric Categories

Source: EAB. (2016). Selecting Core Performance Metrics.

The Right Metric

❑ Is simple and self-explanatory.

❑ Objectively measures success.

❑ Offers a comparison that gauges performance over time.

❑ Involves a broad range of decision makers.

❑ Focuses stakeholder attention on what matters most to success.

❑ Measures impact, not activity.

❑ Provides a common language for communication.

❑ Is cost-effective: The time and effort to track, compile, compute, and translate is justified by the quality of information gleaned.

❑ Matches the scope of the goal (example: if the goal covers the entire institution, the metric should cover the entire institution, too).

5
Metrics

Source: Alfred, 2005; SCUP. Planning Institute Design.

EAB

Frequently-Used Key Performance Indicators

Human Resources

Hire to Retire

- Cost per hire
- Hires per HR FTE
- Time to process retirement application
- Time to process new benefits packages
- Time to onboard new employee
- Cost of training and development
- Candidate satisfaction
- Customer satisfaction

Payroll

- Time to process new payroll
- Payroll costs per employee
- Time to process time sheets
- Payroll error rate

Travel and Entertainment

- Time to reimbursement
- Travel reimbursement error rate
- Expense report processed per HR FTE
- Expense report processed per HR FTE per business day
- Cost per expense report

Productivity

- HR costs per HR FTE
- HR costs per employee
- HR FTEs per 100 employees

IT

Help Desk

- First call resolution rate
- Percentage of abandoned calls
- Percentage of hardware service requests closed within 24 hours
- Percentage of software service requests closed within 24 hours
- Cost per call
- Percentage of calls needing escalation for resolution

Network

- Number of outages
- Maximum duration of outage
- Unplanned network downtime
- Number of bandwidth utilization threshold violations

IT Vendor Management

- Maximum time to resolve issues
- Percentage of contracts renegotiated prior to renewal

Security

- Number of adverse events
- Time to issue access rights
- Time to revoke access rights

Finance

Accounts Receivable

- Time to process payments
- Percent delinquent payments
- Time to contact customer about open invoice
- Time to process invoice
- Error rate
- Cost per invoice
- Invoice per accounts receivable FTE
- Invoice per accounts receivable FTE per day

Accounts Payable

- Percent delinquent payments
- Time to process an invoice
- Payment processing frequency
- Percent of time-sensitive requests processed immediately
- Error rate
- Cost per invoice
- Invoice per accounts payable FTE
- Invoices per accounts payable FTE per day

Procurement

- Time to purchase approval
- Percent of purchase on contract
- Purchase orders per procurement FTE
- Purchase orders per procurement FTE per day
- Cost per dollars spent

Common Student Success Metrics

- First year retention rates
- Term-to-term persistence rates
- Critical course DFW rates
- Four-year graduation rates
- Six-year graduation rates
- First destination surveys

Cut data by race, gender, ethnicity, income, first-generation status, and other demographics aligned with your population

Pre-College Academic Preparation

1. High school teacher expectations
2. Access to AP courses
3. Access to ACT/SAT prep courses
4. ACT/SAT test taking rates
5. Placement in developmental education
6. Success in developmental education
7. Disciplinary rates and experiences in K-12 schools
8. Writing ability by English Language Learner (ELL) status
9. Geographical access to higher education institutions
10. Impact of diversity of high school teachers
11. Segregation of K-12 schools
12. Access to guidance counselors
13. SAT/ACT scores by income quintile
14. AP exam pass rates

Family Expectations and Self Efficacy

15. Family expectations of student's ability to go to college
16. Family expectations of student's ability to succeed in college
17. Student expectation of their own ability to succeed
18. Resilience during the job and internship search
19. Impact of first failed course
20. Acceptance rates in competitive majors
21. Family perception of importance of high-impact practices
22. Undermatching in college selection process
23. Undermatching at the course-level
24. Impact of academic probation and dismissal language
25. Parental pressure on major choice
26. Disparity between high school and college GPA

Climate

27. Sense of belonging on campus
28. Perception of inclusivity in major
29. Treatment by local businesses
30. Treatment by local community
31. Impact of negative diversity event
32. Diversity of student organization leadership in relation to student body demographics
33. Success rates based on demographics of faculty encountered
34. Responsiveness of faculty to students
35. Consideration of racial justice activism in admissions decisions
36. Interactions with campus and local law enforcement
37. Access to facilities (e.g. building accessibility, gender neutral restrooms)
38. Faculty and staff diversity in relation to student diversity

Financial

39. Perception of cost of college
40. Ability and desire to take on debt
41. Application fee waiver request rates
42. FAFSA submission rates
43. Timing of FAFSA submission
44. Financial aid verification selection rates
45. Financial aid verification completion rates
46. Impact of unmet financial need
47. Ability to afford social experiences
48. Internet access at home
49. Ability to afford course materials
50. Need to work while enrolled in college
51. Need to support dependents
52. Impact of financial emergencies
53. Loss of scholarship rates
54. Rate of recovery from loss of financial aid or scholarships
55. Exhaustion of financial aid eligibility
56. Food insecurity
57. Housing insecurity
58. Access to transportation
59. Ability to afford graduation regalia
60. Access to employer-sponsored tuition reimbursement programs
61. Ability to take unpaid internships

Pedagogy and Academic Experience

62. GPA in lecture-heavy courses
63. Perception of representation within curriculum
64. Impact of grading practices
65. Perception that curriculum is relevant to students' goals and values
66. Teaching in First Nations' languages
67. Effect of pre-requisite course sequencing
68. Grades in online courses
69. Completion of online courses
70. Major switching patterns
71. Junior graduation rates

College Navigation

72. Likelihood to register late for classes
73. Student expectations of coursework rigor
74. Utilization of mental health resources
75. FAFSA resubmission rates
76. Summer melt rates
77. Unproductive credit accumulation
78. Enrollment in toxic course combinations
79. Graduation application submission rates
80. Understanding of re-enrollment policies
81. Perceptions of time needed to study
82. Parental engagement by ELL status
83. Expectations of frequency of faculty interactions
84. Understanding of academic honor codes
85. Impact of academic jargon
86. Knowledge and use of medical withdrawal policies
87. Enrollment by discipline
88. Knowledge and use of academic support resources

Post-Graduate Outcomes

89. Participation rates in undergraduate research
90. Participation rates in study abroad opportunities
91. Experience during study abroad
92. Ability to use social network for career advancement
93. Post-graduate employment rates
94. Alumni engagement rates
95. Post-graduate economic mobility
96. Career fulfilment and engagement
97. Impact of student debt
98. Career boost from non-degree credential
99. Student loan default rates
100. Participation rates in internships
101. Participation rates in learning communities
102. Participation rates in service-learning
103. Ability to receive letter of recommendation from faculty member
104. Graduate school application rates

Policies and Procedures

105. Need and ability to apply for financial independence
106. Ability to access all required courses
107. Faculty dropping students from courses
108. Need for on-campus housing during breaks
109. Misalignment between aid disbursement and billing
110. Mismatch between credit accumulation and financial aid awards
111. Placement on academic probation
112. Referrals to honor board
113. Impact of registration and bursar holds
114. Impact of differential tuition rates
115. Impact and knowledge of transfer credit articulation policies
116. Knowledge of Title IX policies and procedures

Create an Evaluation Matrix

	Focus Group	Survey	Project Records	Observations
Evaluation Question #1				
Evaluation Question #2				

Create a Metric Matrix

	Metric #1	Metric #2	Metric #3	Metric #4
Evaluation Question #1				
Evaluation Question #2				

Importance of Reporting

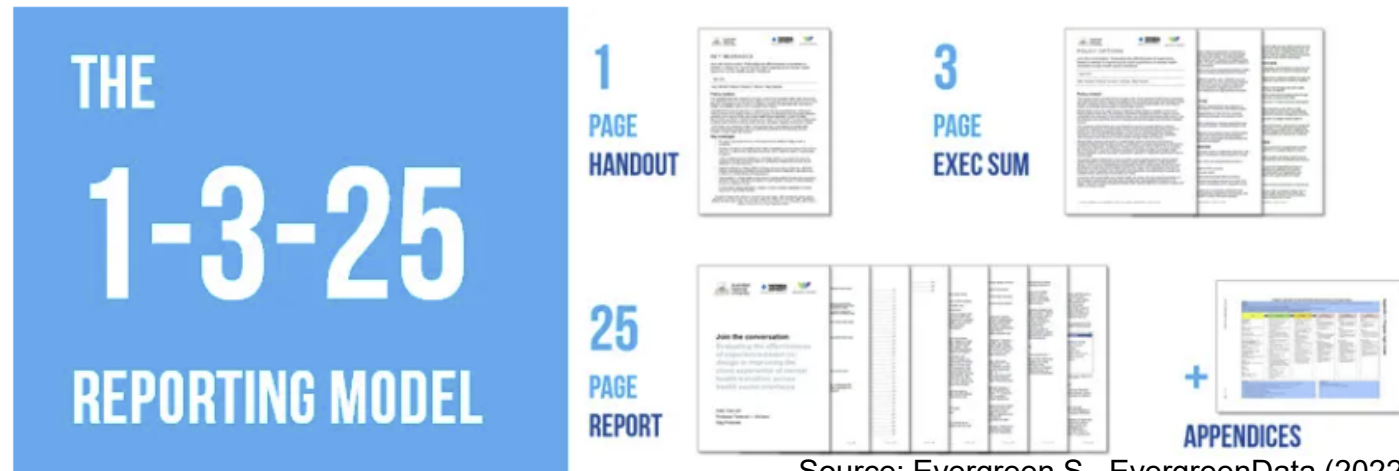*Determining your reporting strategy*

1. Identify the story that needs to be told

2. Prioritize key, digestible messages over exhaustive reporting

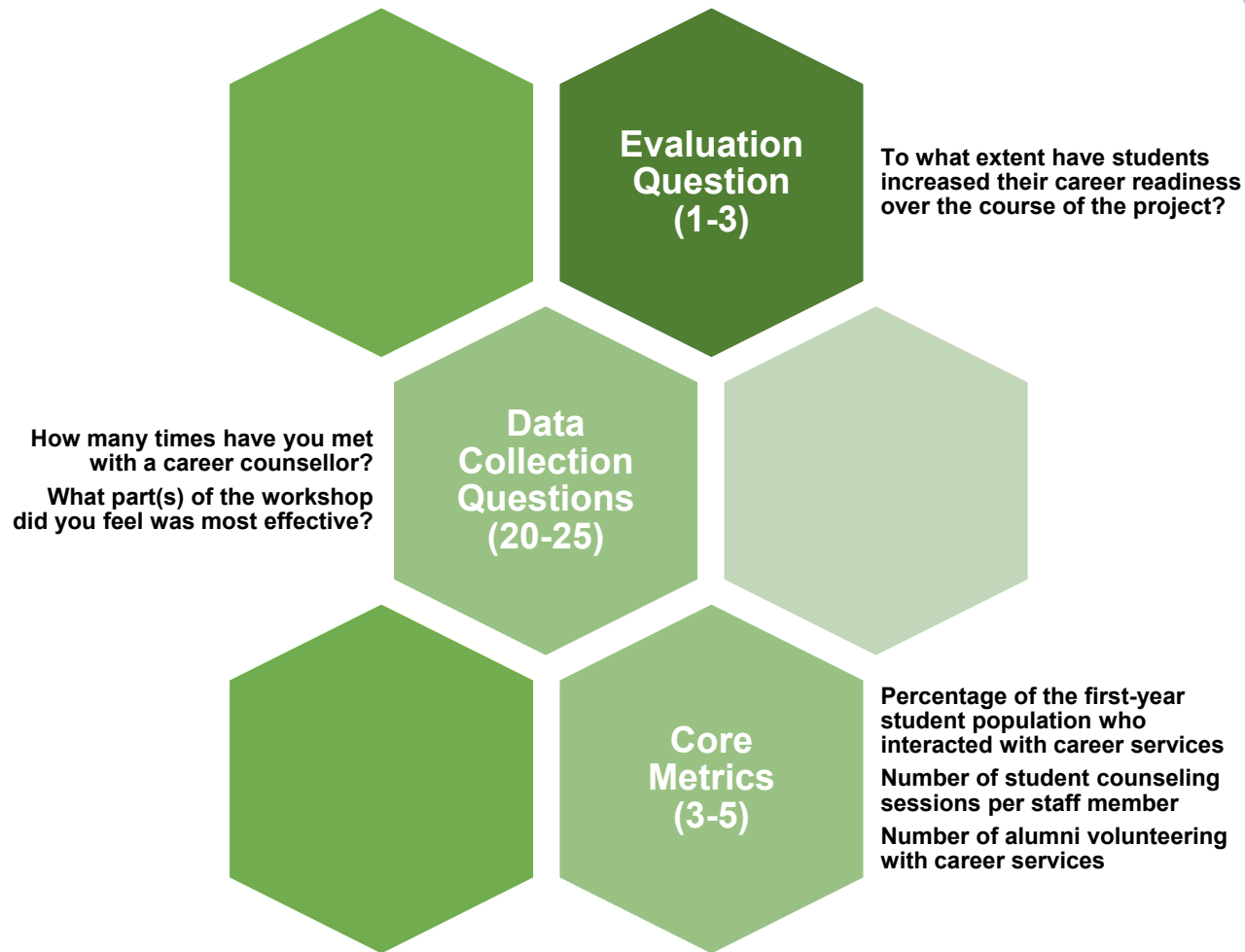3. Select style that will be most effective for specific readers

6
Reporting

The 1-3-25 Reporting Model

Source: Evergreen S.. EvergreenData (2022)

Why are these steps important?

Good quality evaluation of the project allows to:

- to better understand what **long-term** or **sustainable changes** have occurred;

- to be **accountable** to different stakeholders and collaborators;

- to use the findings to **advocate** for changes in policies, strategies and practices;

- to communicate **achievements** internally and demonstrate long-term **successes**, justify funds received, and solicit further funding;

- to assist in decisions about **scaling** up: provide information about which bits work and which bits don't, and so provide policy-relevant information for redesign and the design of future programs.

Planning for Evaluation Infographic captures the steps we recommend to take as you design your project evaluation.

- Front-end planning for evaluation is important.
- Collecting and managing the data requires resources.
- Ensuring there is a logical link between objectives, inputs, activities, outputs and outcomes.
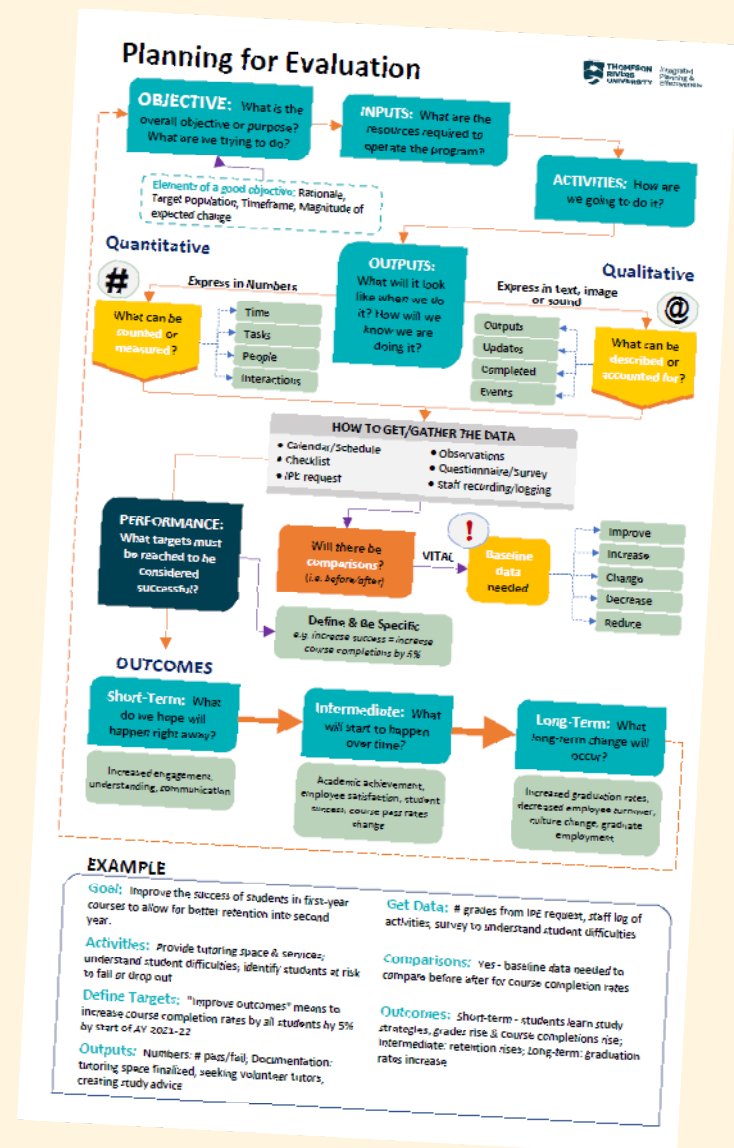
Information & Resources Available for
your Project Evaluation
Embedding Integrated Planning into
your project
Project Evaluation Part 1 & 2
Open Sessions (bring your questions)

JANUARY

M	T	W	T	F
2	3	4	5	6
9	10	11	(12)	13
16	17	(18)	19	(20)
(23)	24	(25)	26	27
30	31			

FEBRUARY

M	T	W	T	F
		(1)	2	(3)
(6)	7	8	(9)	10
(13)	14	15	16	17
20	21	22	23	24
27	28			

Thank you! Kukwstsétsemc

We always welcome your questions, inquiries, and feedback.