Washington 21st CCLC Local Evaluation Toolkit

Washington Office of Superintendent of PUBLIC INSTRUCTION

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A resource supporting the use of the Washington 21st CCLC Local Evaluation Guide

Purpose: This toolkit includes resources to support centers in their efforts to plan and conduct local evaluation and engage in a continuous improvement process.

Using This Toolkit: This toolkit aligns directly with information presented in the ***Washington Office of Superintendent of Public Instruction (OSPI) Local Evaluation Guide.*** Details for completing the templates and using the resources are in the guide. As applicable, page numbers from the guide are included at the beginning of the resource to assist with this alignment. The resources provided in this toolkit may be customized to best meet the needs of the grantee. This toolkit builds on the work done by the Texas Education Agency (TEA) in partnership with AIR and Diehl Consulting Group.

Resource 1. Guide to Hiring an Independent Evaluator[1]

*The guide to hiring an independent evaluator aligns with **page 6 of the*** **Local Evaluation Guide.** *The guide may be helpful in selecting an independent evaluator for your program.*

A program evaluator is someone who has formal training or experience in research and/or evaluation. Organizations are required to follow local procurement practices when contracting for evaluation services, and the following discussion points and questions might be helpful when making selections.

- ***Evaluation philosophy.*** Look for an evaluator who believes the evaluation should be a collaborative process with the evaluator, program managers, and staff. In this philosophy, program managers and staff are experts in the program, and evaluators work closely with them throughout the process. The evaluator provides program support in documenting program activities, developing performance measures, collecting additional data, interpreting evaluation findings, and making recommendations for program improvement. The purpose of evaluation in this context is to improve the program, not to make judgments on calling the program a success or failure. Ask the candidates to describe what they see as the end result of an evaluation and how relationships are managed when conducting an evaluation.
- ***Education and experience.*** There are very few university degree programs in program evaluation; instead, program evaluators often have backgrounds in the social sciences, such as psychology, sociology, criminal justice, public administration, or education. Most evaluators have some degree of formal training in research methods, often through graduate-level coursework. For example, someone with a master's degree or doctorate in education or the social sciences should have the research knowledge necessary to conduct evaluations. Evaluators should have expertise in qualitative methods, such as interviewing and focus groups, as well as quantitative methods for analyzing surveys and attendance data. Evaluators also differ in their familiarity with different kinds of databases and computer programs. It is critical to find an evaluator that has the kinds of experience you need, so be sure to ask about specific experience with a wide range of evaluation-related tasks that might be needed in your evaluation.

Considerations: *Ask the candidates to describe how they were trained as an evaluator. Did they complete courses specific to evaluation or research methods? What kinds of methods (qualitative, quantitative, or both) are they comfortable with? Did they work alongside an experienced evaluator prior to stepping out on their own?*

[1] Materials are adapted from Orchowsky, S., Carson, T., & Trahan, M. (2001). *Hiring and working with an evaluator.* Juvenile Justice Evaluation Center. https://www.ojp.gov/library/publications/hiring-and-working-evaluator. Information was further adapted with permission from the Michigan Department of Education 21st Century Community Learning Centers (CCLC) program.

- ***Content knowledge.*** Although evaluation has a great deal in common with conducting research, there are many differences between research and evaluation. A qualified evaluator must have not only research skills but also specific experience in working with programs like yours. Some may have worked in a program, as a project director or site coordinator, before becoming an evaluator. Ask candidates whether they have evaluated similar programs with similar target populations. If so, they may have knowledge and resources that will save time and money. If they have worked with programs that are somewhat similar but may have differed in the group served (e.g., they have not evaluated afterschool programs but have worked with early childhood programs), they may still be a reasonable choice as long as you help them understand the unique context of your program and its participants.

> ***Considerations:*** *Carefully review each evaluator's résumé to determine whether they have experience conducting evaluations of programs like yours. Ask the candidates to describe their previous work.*

- ***Oral communication skills.*** Evaluators must be able to communicate effectively with a broad range of people, including parents, program staff, other evaluators, community members, the media, and other stakeholders. They should be able to speak plainly and explain scientific jargon when necessary. Someone who cannot clearly explain evaluation concepts to a lay audience is not a good candidate. An evaluator needs to be able to connect comfortably with program staff and participants. It can be helpful to ask candidates to share an example of how they would communicate some evaluation findings to staff.

> ***Considerations:*** *Determine if the candidate is someone you would feel comfortable working with. Ask the candidate to explain their approach to presenting and communicating information to various stakeholders.*

- ***Writing skills.*** An evaluator must have strong writing skills. The process of rewriting evaluation reports takes time, and the scientific integrity of evaluation results can be threatened if the report must be rewritten by someone other than the evaluator. Have candidates bring writing samples, including evaluation reports, articles, and PowerPoint slides for presentations that they have developed to share findings.

> ***Considerations:*** *Ask for samples of each evaluator's work. Review the materials to be sure they are written clearly, without a great deal of jargon, and in a way that would be understandable to those receiving the information.*

- ***Cultural competency.*** An evaluator's approach must demonstrate respect for the various cultures of the communities where the evaluator works. Mutual respect along with understanding and acceptance of how others see the world is crucial. Genuine sensitivity to the culture and community will increase the comfort level of program staff, participants, and other stakeholders to encourage their involvement. It also will ensure that data collection tools are appropriate and relevant, thus increasing the accuracy of findings.

> ***Considerations:*** *Ask the candidates tough questions, especially if you work with a population that has historically been stereotyped or treated unfairly. Ask the candidates what experience they have with the population you serve. Keep in mind that no one is without assumptions; however, being aware of and confronting assumptions with honesty is a critical skill for evaluators to be able to achieve cultural sensitivity.*

- ***Budget and cost.*** Ideally, you should ask candidates to prepare a written proposal for your evaluation, including a budget. To get good proposals, provide candidates with clear information about the program's objectives, activities, and audience. Be explicit about the deliverables expected from the evaluator, as outlined in the Washington 21st CCLC requirements, so that both parties agree about the level of effort required to complete the work.

> ***Considerations:*** *Present the candidates with expectations for the job requirements and cost. Be clear about the required elements. Allow them time to consider and negotiate. Be open to what additional ideas they may have to supplement the required elements.*

- ***Time and access.*** Make sure that candidates have the time to complete the necessary work. Site visits and regular meetings will be necessary. The more contact the evaluator has with your program, the better the evaluator will understand how it works and the more opportunities the evaluator will have to monitor data collection activities. Regular meetings also let you monitor the evaluator's performance and stay on top of the timeline.

> ***Considerations:*** *Ask the candidates what their other professional commitments are and how much time they will be able to devote to your project. Compare their responses to your estimates of the time needed to do the work. Develop a timeline together with your chosen evaluator that describes various stages of the evaluation process, including site visits and data collection (e.g., analysis, report writing).*

- ***Data ownership and control.*** Organizations should follow their own local contracting policy and data-sharing agreements. It is essential that project staff review, in advance, all evaluation reports and presentations before they are released to the funder or other audiences. This process ensures that program staff are

> ***Considerations:*** *This point is nonnegotiable. Be sure to be clear with the candidates about data ownership.*

aware of the results and have an opportunity to correct any inaccuracies. As part of the written data-sharing agreement or contract, be sure to include a requirement that the evaluator review data and reports with you prior to all public dissemination of results. In addition, it is important to establish that the evaluator will be working for the project, not the funder.

- ***References.*** Ask for references and check them. Be sure that references include directors of programs that each candidate has worked with and ask about specific experiences with the candidate, such as how well the evaluator worked collaboratively with staff and how the evaluator navigated any challenges that arose during the evaluation.

Finally, keep in mind that an important part of an evaluator's job is to assist in building the skills, knowledge, and abilities of staff and other stakeholders. It is critical that all parties can work well together. Make sure to invite finalists to meet the local evaluation team, program staff, and others with whom they will be working to see who best fits with individual styles and your organizational culture. If the fit is good, your evaluation is off to a great start. Sample interview questions are provided in the box.

Sample Interview Questions

Philosophy/Approach

- How would you describe your overall philosophy of evaluation?
- Describe what you see as the end result of an evaluation.
- How do you manage relationships when conducting an evaluation?

Training/Experience

- What type of training do you have as an evaluator? Did you complete any courses specific to evaluation or research methods?
- What types of methods (qualitative, quantitative, or both) are you most comfortable with?
- Have you evaluated similar programs with similar target populations?
- Describe your previous work as an evaluator. What specific experiences do you have doing a wide range of evaluation-related tasks?

Communication

- Provide an example of how you would share some evaluation findings with different stakeholders (e.g., parents, staff, community members).
- What is your approach to presenting and communicating information?

Cultural Competence

- What experience have you had with the population our program serves?

Time Commitment

- How much time will you be able to devote to this project?
- What other professional commitments do you have that may impact the time you are able to devote to this project?

Resource 2. Sample Independent Evaluator Agreement Template[2]

*The sample local independent evaluator template aligns with **page 6 of the** **Local Evaluation Guide.** Although some grantees may have their own contract agreements to draw from, others may find the template useful in constructing agreements for evaluation services.[3] It also may be useful when deciding on roles and responsibilities for internal evaluators. When using the template, text in orange should be customized to meet specific grant needs, the level of evaluation service needed, and the local evaluator cost guidelines outlined for your grant cycle. The items in orange are suggestions and should not be included in the final document. Also, the included content is based on including all required and recommended evaluation activities outlined within the* Local Evaluation Guide.

Independent Evaluator Service Agreement Between *[Washington 21st CCLC Grantee (Grantee)]* and *[Evaluator/Agency Name]*

Charge

The independent evaluator (evaluator), [Evaluator/Agency Name], has been engaged by the [Washington 21st CCLC (grantee)] to evaluate the implementation of the Washington 21st Century Community Learning Centers (21st CCLC) grant from the Washington Office of the Superintendent of Public Instruction.

Contact Information

[Evaluator/Agency Name] can be contacted at [address, phone, fax, email].

[Evaluation contact name] will be the evaluation contact for the program. [Grantee] can be contacted at [address, phone, fax, email]. [Grantee contact name] will be the contact for the program.

Audiences

The primary audiences for this evaluation are as follows: [List audiences with which the evaluator and/or grantee will share evaluation data, e.g., school districts, OSPI, potential new funders, parents/students/community].

[2] Adapted with permission from the Michigan Department of Education.

[3] All contracted services paid with federal 21st CCLC funds must comply with the procurement standards and other relevant requirements in the TEA's *General and Fiscal Guidelines* and federal regulations.

Reporting and Dissemination

The evaluator will be responsible for collaborating with the project director and center staff to plan the evaluation and to draft and edit evaluation reports as outlined in the next section. The grantee will be responsible for completing the reporting requirements indicated by OSPI, with evaluator support. It is understood that the evaluation report will be as concise as possible, but additional information can be provided by the evaluator upon request. Required and recommended reporting guidance is provided in the *Local Evaluation Guide*.

The evaluator will release the evaluation report to the grantee with the understanding that the grantee will submit the report to the OSPI by the due date and disseminate the report, along with any accompanying statement, to other key stakeholders. The evaluator will work with key grantee members to help interpret the data. The evaluator may be requested to assist in presenting findings and facilitating discussions with key stakeholders in understanding the report. In all cases, the evaluator will review data and reports with the grantee prior to all dissemination of results. The grantee may choose to endorse or not endorse the report depending on its judgment of the quality and appropriateness of the report by inserting a statement at the beginning of the document or attaching a separate letter.

Evaluation Activities

Activities that are included in the evaluation are as follows:

- Assist in building the skills, knowledge, and abilities of center staff and stakeholders in implementing center-level evaluation activities.
- Participate fully in the development and planning of a center-level logic model and overall process and outcome evaluation. This includes meeting with the project director to review the OSPI'S evaluation requirements and creating a project plan and timeline for identifying evaluation methods and implementing the evaluation activities. Also, determine what additional data will be collected along with data collected through Washington 21st CCLC and state-level evaluations made available to local evaluators, as applicable. These data should include a review of the needs assessment used to inform the program.
- Participate fully in implementation of the evaluation plan and lead collection of data as specified in the plan, following the agreed-on timeline.
- Conduct on-site quality observations. Quality assessment strategies and frequency of observation will be identified by the local evaluation team.
- Document process and outcome results to guide decision making.
- Participate in improvement planning to improve operations and programming by identifying improvement needs and challenges.
- Conduct quantitative and qualitative data analysis and assist centers in understanding the results.
- Produce an annual executive summary for submission to the OSPI and a local program evaluation report for public posting by the grantee. Required and recommended reporting guidance is provided in the *Local Evaluation Guide*.

Resources

It is expected that sufficient resources will be made available to the evaluator by the grantee for this evaluation based on the allowable funding levels provided in the cycle grant application. The grantee key staff and district staff will be available to collaborate with the evaluator to provide support for the evaluation. The grantee may authorize the evaluator to request access to the Washington 21st CCLC System (OSPI data tracking system), provided that the evaluator specifies how the data will be secured and used. The local evaluator will attend relevant conferences, meetings, and conference calls to understand and collect data. If costs are incurred for conferences, the grantee will pay the additional costs (e.g., hotel, registration). The total cost of the evaluation of the **[number of]** *program sites* for the time period of August 1, **[year]**, to July 31, **[year]**, will be **[total amount of contract]**. Additional years of evaluation may be negotiated upon receipt of future funding and mutual consent. Payments will be made to the evaluator in the amount of **[list payment schedule—amount & dates], [link payment increments to deliverables]**.

Grantee Evaluation Deliverables

The evaluation deliverables for **[school year]** include the following:

[Note: Customize the deliverables to address your evaluation needs.]

Deliverable	Due date/process
1. Participate on a local evaluation team and assist in informing improvement planning.	• Beginning (August/September) • Middle (December/January) • End of year (May/June)
2. Develop center-level logic model(s) in partnership with the local evaluation team.	• Due annually on the first Monday of November (OSPI requirement)
3. Complete and update process and outcome evaluation plans in partnership with the local evaluation team.	• August/September (annually)
4. Implement evaluation activities as outlined within the evaluation plans (e.g., quality assessment observations, surveys, focus groups).	• Based on evaluation plans
5. Submit either a grantee-level or a center-level executive summary to the grantee for submission to the OSPI.	• Evaluator to submit summary to grantee by ***[date]*** • Due annually on the first Monday of November by grantee (OSPI requirement)
6. Submit an annual evaluation report to the grantee.	• Evaluator to submit report to grantee by ***[date]*** • Grantee to post report annually on the first Monday of November (OSPI requirement)

Evaluation Use

The evaluator will present the evaluation reports and findings in such a manner that *grantee* members will understand and be able to use the data to inform decisions and program improvement. The presentation of findings may include (but is not limited to) the following:

- **[One-on-one meetings with project director, site coordinators, school representatives, others]**
- **[Group meetings with site coordinators, center staff, school staff, others]**
- **[Workshops designed to understand and use data resulting in improvement plans]**
- **[Site visits during program time]**
- **[Formal presentations to key stakeholder groups, such as the advisory group, boards of education, community groups, others]**

Access to Data and Rights of Human Subjects

It is understood that the grantee will make available to the evaluator all data and reports required by the evaluator to fulfill contract requirements. The Family Educational Rights and Privacy Act regulations allow local evaluators to have access to student data if the evaluation is designed to

> conduct studies for, or on behalf of, educational agencies or institutions for the purpose of developing, validating, or administering predictive tests, administering student aid programs, and improving instruction, if such studies are conducted in such a manner as will not permit the personal identification of students and their parents by persons other than representatives of such organizations and such information will be destroyed when no longer needed for the purpose for which it is conducted, and contractual partners with **[Name of District]** schools. (The Family Educational Rights and Privacy Act, FERPA).

In the implementation of this evaluation, the evaluator will take every precaution to adhere to the three basic ethical principles that guide the rights of human subjects as derived from the Belmont Report: respect for persons, beneficence, and justice. Evaluation data will be collected in a manner representing these principles, and evaluation reporting will be done with respect to human dignity, providing constructive feedback without bias. The evaluation will be conducted adhering to the American Evaluation Association's Guiding Principles, which include systematic inquiry, competence, integrity/honesty, respect for people, and responsibilities for general and public welfare.

Signatures

This evaluation agreement has been reviewed by both the **[grantee fiscal agent]** and the local evaluator. The signatures and dates signify that the agreement is satisfactory to all parties, and there are no conflicts of interest on behalf of the evaluator in conducting this evaluation.

[Evaluator Contact & Agency Name]	Date
[Grantee Fiscal Agent & Agency Name]	Date

Resource 3. Logic Model Resources and Template

A logic model is a common tool for depicting your program focus, implementation plan, and outcomes. It describes your program and guides the evaluation. Additional resources to support logic model development are provided in this resource as a supplement to guidance provided on ***pages 13–16 of the*** **Local Evaluation Guide.** *A logic model template also is provided. Please refer to the guide for a description of the concepts in this template. You may find it helpful to use this template as is or modify it to assist in completing the logic model requirements for your grant evaluation.*

Selected Logic Model Resources		
Logic Model Development Guide from W.K. Kellogg Foundation	A comprehensive 71-page guide that outlines the process for developing a theory of change and logic model for your program and using those tools to develop an evaluation plan	*https://www.betterevaluation.org/sites/default/files/2021-11/Kellogg_Foundation_Logic_Model_Guide.pdf*
Theory of Change Basics from ActKnowledge	A brief overview of the rationale and process for creating a theory of change model to guide program design	http://www.theoryofchange.org/wp-content/uploads/toco_library/pdf/ToCBasics.pdf
Logic Model Workbook from Innovation Network	A step-by-step guide including templates for designing a program's logic model and using it to evaluate results	*https://www.innonet.org/news-insights/resources/logic-model-workbook/*
Extension Logic Models from the University of Wisconsin	A description of logic models and a selection of templates and examples	*https://logicmodel.extension.wisc.edu/*
Developing a Logic Model: Teaching and Training Guide from the University of Wisconsin	A detailed description of logic models, including training materials and a framework for development	https://fyi.extension.wisc.edu/programdevelopment/files/2016/03/lmguidecomplete.pdf

Logic Model

Youth, family, and community needs	Center goals	Implementation (process evaluation)			Outcomes (outcome evaluation)
		Inputs (resources/assets)	Program and center activities	Outputs (products/fidelity)	

Resource 4. Measurement Guidance

This measurement guidance aligns with information provided on ***pages 17–21 of the*** **Local Evaluation Guide** *and is intended to assist centers in decision making and local evaluation planning.*

Selecting Measures for Local Evaluation

Centers are encouraged to select measures to use in their local evaluation efforts that best align with their center goals. Many existing measures have been developed that could support a center's process or outcome evaluation efforts, but sometimes instruments do not fit well with what the team is hoping to measure. Therefore, it is an option to adapt or create custom measures that better suit the center's needs. Both strategies have advantages and disadvantages. This information is outlined below, along with tips for customizing or developing measures to support your center's evaluation planning process.

Standardized Measures	
Pros	**Cons**
✓ Has typically undergone psychometric analysis, making it more rigorous	✓ May not measure exactly what you want to measure
✓ Is more likely to have reliability, or consistency in responses	✓ May be a longer measure than is desired
✓ Is more likely to have validity, or certainty that it is measuring what it intends to	✓ May use more technical terms that aren't clear to your participants
✓ Already completed and requires no time to develop	✓ May charge for administration and be cost prohibitive for centers
✓ May have comparison data to see how your participants compare to others	

Locating Standardized Measures

- *From Soft Skills to Hard Data: Measuring Youth Program Outcomes:* https://forumfyi.org/knowledge-center/from-soft-skills-to-hard-data/
- *Afterschool Youth Outcomes Inventory:* https://pasesetter.org/initiatives/youth-outcomes/the-afterschool-youth-outcomes-inventory-second-edition
- Measuring Youth Program Quality:

  https://forumfyi.org/weikartcenter/assessments/

Considerations: *Outcome measures are the most difficult to create and therefore it is wise to use existing measures. It is better to use entire sections rather than change quality assessment tools. Satisfaction surveys of stakeholders may be the easiest for centers to customize.*

Examples of When You Might Want to Customize

- **Quality assessment**: The quality assessment tool you chose is very long and takes a long time to complete. You want to make it less overwhelming for your team to participate in the assessment, as well as be more targeted on specific areas of quality.
- **Social and emotional outcomes youth survey**: A wide variety of social and emotional outcomes can be measured. You locate a survey that has many skills identified as a focus for your program. However, the instrument includes skills you don't focus on and is missing some that are really important.

Custom or Adapted Measures

Pros	Cons
✓ Measures exactly what you want to measure ✓ May be a shorter measure that takes less time for participants to complete ✓ Piloting the measure can help further tailor the measure specifically to your needs	✓ Adapting or changing existing measures at all removes all existing validity/reliability ✓ Takes time to develop, especially if developing a completely new measure ✓ Can be difficult to work out conceptually what is desired to be measured; can be difficult to achieve clear definitions and indicators ✓ Should undergo a pilot to test how the instrument performs ✓ Ideally requires support from someone with more advanced measurement design skills

Considerations: *There is a difference between measures that are open source and those that have a copyright. Explore whether the measure is open source and can be used freely or adapted to meet the program's need. Contact the owner of the measure to obtain necessary permissions to use as is or adapt.*

Steps for Developing Custom or Adapting Existing Measures		
Step	**Developing custom measures**	**Adapting existing measures**
Establish clear goals	Start with clear goals about what you hope to accomplish and cover with the measure, making sure everyone on the team agrees and can stay focused on this purpose. This will help limit debates later.	Start with a discussion of your goals compared with the existing measure. Establish what is not working with the measure and be clear on why adapting is the best path forward, after weighing the pros and cons.
Outline core components	Develop detailed definitions of any key concepts so that it is clear what you are examining. This may need additional refinement later, but focusing on having consistent definitions early will allow for clarity throughout the process.	Discuss all the concepts in the measure one by one, outlining what can be kept and what areas need to be changed. Also outline what key concepts are missing.
Craft indicators	Craft a list of all key indicators that are specific and clear about what you are measuring, have observable actions or behaviors, and are measurable and quantifiable.	For any concepts that are missing, craft detailed indicators for what you want to cover.
Develop questions	Working from your list of indicators, develop each individual question for your measure. This may require many meetings or drafts of versions to be passed around to all team members. • Best Practice Tip: Test out the questions with some of your participants to see how they sound to them.	Work through the list of changes. Develop new items using your new indicators. Remove extraneous items. Make any minor adaptations, being cautious of any possible confusion. • Best Practice Tip: It can be better to simplify by reducing the number of items or entire sections rather than changing wording or scale to a yes/no, so as to not lose meaning.
Pilot the measure and refine	Before launching the measure for use across the center or grantee, pilot it with a small group of stakeholders. After collecting data, discuss what suggestions they have for changing the measure and make the appropriate changes.	Vet the adapted measure with relevant stakeholders and participants to make sure any changes are clear. Refine the measure accordingly after the feedback.

Resource 5. Local Evaluation Planning Guide: Diving Deeper

This local evaluation planning guide supports process and outcome evaluation planning outlined on ***pages 17–21 of the* Local Evaluation Guide.**

Benefits of Annual Evaluation Planning

Guidance for constructing local process and outcome evaluation plans is provided in the *Local Evaluation Guide,* and templates for developing these plans are provided in this toolkit. As centers develop these plans, it is important to ensure that plans are reviewed annually and adjusted to examine evaluation questions that may need further exploration. Specifically, collaboratively reviewing prior evaluation results and deriving local evaluation questions for further study allows for a deeper dive into how to solve issues of particular importance to a center. Through this process, questions most meaningful to all center staff can be explored, which allows center staff to engage more fully in the evaluation process and increase the overall likeliness of the findings being used to drive program improvement and sustainability.

This guide outlines a process for identifying local evaluation questions that a center may want to examine during the current school year. The questions can be embedded within your process evaluation plans or used to supplement or expand on your outcome evaluation plan for the year.

Key Steps to Developing Local Evaluation Questions
Step 1. Review prior evaluation results to identify key findings and areas for further study
• Organize all evaluation results by your center-level goals. This review largely depends on data available to the center (e.g., site visit reports; staff, student, and family interviews and/or surveys; student academic and behavioral information). • Discuss the following questions: 1. What do we know about our program? *List up to five key findings from the review. A key finding is defined as a result that stands out as especially meaningful or important to the evaluation team. It could be a positive or negative result. For example, 80% of the program staff report students are satisfied with the program, but only 50% of the youth reflect this same level of satisfaction.* 2. What do we want to know more about? *Based on the key findings generated, list any initial questions that may warrant further exploration. For example, why are staff and youth reporting different levels of satisfaction?*

Step 2. Prioritize either process or outcome evaluation questions for further study

- Based on the list of initial questions identified, narrow the list down to two (or more) initial evaluation questions.

When prioritizing questions, consider the following criteria:

- Extent to which the question can be addressed this school year
- Center's capacity to collect data to examine the question
- Meaningfulness of the question in relation to the needs being addressed by the center, including program improvement or sustainability efforts

Step 3. Refine and specify the evaluation questions

- Refine and specify the evaluation questions in measurable terms.

Tips for creating good evaluation questions:

✓ Use SMART criteria from the *Local Evaluation Guide*
✓ Focus on something specific, not a general idea
✓ Clearly define key terms within the question to ensure consistency with interpretation
✓ Avoid broad questions by limiting the scope of the question to areas deemed most important
✓ Ensure that it is measurable
✓ Link the question to program improvement or sustainability to ensure that the question is useful to the center

Step 4. Develop an evaluation plan for each evaluation question identified, including core methods for examining the evaluation question *(Note: Local evaluators have expertise in this area and will be instrumental to the successful design and implementation of the evaluation plan).* **Key aspects of evaluation plans are described here. The evaluation plan on page 15 of the *Local Evaluation Guide* can be adapted for this purpose.**

- **Identify the Evaluation Question:** *Identify the evaluation questions of interest to your program from Step 3.*
- **Process/Outcome Measure:** *Decide what will be reviewed to determine progress (e.g., materials, specific percentages or numbers). Measures should be directly aligned with the activity or program attribute being assessed.*
- **Data Collection Method and Timeline:** *Specify how your measures will be collected, including the type of measure and the timeline on which it will be administered.*
- **Responsible Party:** *Identify specific individuals who are responsible for data collection and make sure they are adequately trained.*

Examples of process and outcome evaluation plans are provided on the following pages.

Step 5. Implement the evaluation plan

Depending on the proposed methodology, provide adequate training to program staff on evaluation activities and initiate data collection.

Step 6. Communicate and use results

Once data are collected, convene the evaluation team to review results and identify areas for program improvement and aspects of sustainability. Results should be included within the required annual evaluation report and communicated to key staff. Further, results should be used to inform the planning for the subsequent school year.

Example: Diving Deeper With Process Evaluation	
• *A key finding identified from an annual program review: 80% of the program staff reported that students are satisfied with the program, but only 50% of the youth reflected this same level of satisfaction. (Data Source: Center Annual Survey)*	
Evaluation Question:	• Why do center staff report that Grade 3–5 youth have a higher level of overall program satisfaction than youth themselves report?
Process Measure:	• Staff and youth perceptions of the program
Method and Timeline:	• A qualitative design will be used to better understand differences in perceptions. Staff-level interviews and youth focus groups will be conducted to explore these differences after the first 4 weeks of programming.
Responsible Party:	• The local evaluator will conduct interviews with program staff and focus groups with identified youth. Data will be shared with program staff to understand differences, and an improvement strategy will be added to the annual improvement plan based on lessons learned.

Example: Diving Deeper With Outcome Evaluation	
• *A key finding identified from an annual program review: Regularly attending third-grade students are not meeting proficiency targets on the STAAR Math Assessment. (Source: STAAR Math Assessment)*	
Evaluation Question:	• Why are third-grade students who are attending regularly not meeting proficiency targets on the STAAR Math Assessment?
Outcome Measure:	• Reasons students are not meeting proficiency targets
Method and Timeline:	• A mixed quantitative and qualitative design will be used to better understand these findings. STAAR math data will first be explored for all regularly participating students. Data for all students who did not meet proficiency will be disaggregated to explore any trends, such as specific areas where students may be struggling the most (e.g., multiplication facts). Staff-level interviews and review of lessons will be examined to explore the alignment of programming with areas where students are not making progress. All data will be examined prior to the start of next year's programming.
Responsible Party:	• The local evaluator will disaggregate data and provide a written report to the program director. The program director will collaborate with the site coordinator to review lessons and conduct staff interviews. Based on findings, an improvement strategy will be added to the annual improvement plan based on lessons learned.

In summary, the development of local evaluation questions provides centers an opportunity to take a deeper dive into specific program areas of interest. Ultimately, discussing the results of these locally derived questions can inform program improvement and sustainability efforts.

Resource 6. Process Evaluation Plan Template

The process evaluation template aligns with guidance provided on ***pages 17–19 of the*** **Local Evaluation Guide.** *You may find it helpful to use this template as is or modify it to assist in developing your local process evaluation plan.*

Process Evaluation Plan			
Process question	**Process measure**	**Data collection method and timeline**	**Responsible party**

Resource 7. Outcome Evaluation Plan Template

The outcome evaluation template aligns with guidance provided on ***pages 20–21 of the*** **Local Evaluation Guide.** *You may find it helpful to use this template as is or modify it to assist in developing your local outcome evaluation plan.*

Outcome Evaluation Plan					
SMART outcome	**Performance measure**	**Participants**	**Data source**	**Procedures**	**Data analysis and reporting**

Resource 8. Washington 21st CCLC Improvement Plan Template

The Washington 21st CCLC Improvement Plan template aligns with guidance provided on ***pages 23–26 of the*** **Local Evaluation Guide.** *You may find it helpful to use this template as is or modify it to assist in developing your improvement plan.*

Washington 21st CCLC Improvement Plan				
Program name:				
Date plan created:				
What successes/assets can support this work?				
Improvement area identified		***Rationale/finding that showed this as an improvement need***		
Improvement strategy	**Specific attainable action steps**	**Responsible person(s)**	**Progress measures**	**Target completion date**
What are possible barriers to success?		**What could be planned to address barriers?**		

Example: Weikart Center Program Improvement Plan Template

PROGRAM GOAL: *(What does success look like? Specific and Supportive; Measureable and Meaningful; Attainable and Actionable; Realistic and Relevant; Time-Bound and Teachable)*				
MEASUREMENT: *(How will you measure progress?)*	☐ PQA Scale or Item: ____ ☐ Leading Indicator: ____ ☐ Youth Measure (DESSA,DAP): ____	☐ Local Evaluation Report: ____ ☐ School Data (Attendance, Behavior, Grades): ____ ☐ Other (specify): ____		
PROGRESS CHECKS:*(When will you check in to be sure you're on track to meet your goal, or to make adjustments to your plan?)*				
Lead Staff: *Who is the primary person responsible for ensuring that the plan is followed?*				
ACTION STEPS: *(What needs to happen?)*	**OUTCOME:** *(When this step is completed, what will be done?)*	**LEADER:** *(Who will be responsible?)*	**RESOURCES:** *(What is needed for success?)*	**TIMELINE:** *(When will this step be completed?)*

Resource 9. SWOT Analysis

The SWOT Analysis Resource aligns with guidance around improvement planning provided on ***pages 23–26 of the*** **Local Evaluation Guide.** *You may find it helpful to use this tool in developing your improvement plan.*

What are the strengths and weaknesses of the group, community, or effort, and what are the opportunities and threats facing it?

<table>
<tr><th colspan="2">Internal</th></tr>
<tr><td>Strengths
Start by listing positive characteristics of the program.
• What advantages does the program have?
• What resources/assets exist?
• What do the youth say?</td><td>Weaknesses
Identify weaknesses from both your own point of view and that of others, including those you serve or deal with.
• What would you improve?
• What is missing?
• Would you attend this program?</td></tr>
<tr><th colspan="2">External</th></tr>
<tr><td>Opportunities
A useful approach when looking at opportunities is to look at the strengths and ask whether these open up any opportunities.
• How could you take this program to the next level?
• What partnerships are present?
• What does the program do in the community?</td><td>Threats
Cast a wide net for the external part of the assessment. No organization, group, program, or neighborhood is immune to outside events and forces.
• What obstacles may the program face?
• Could there be budget issues?
• Could any of the weaknesses threaten sustainability?</td></tr>
</table>

Internal	
Strengths	**Weaknesses**
External	
Opportunities	**Threats**

Resource 10. Magic Quadrant

*The Magic Quadrant resource aligns with guidance around improvement planning provided on **pages 23–26 of the*** **Local Evaluation Guide.** *You may find it helpful to use this to assist in developing your improvement plan.*

Magic Quadrant[4]

1. Start by asking the group, "What do we need to reach our goal or make our decision?"
2. Discuss what it means for your program to choose activities in each quadrant.
3. Decide as a group which quadrant you wish your future activities to be in.
4. Jot down ideas on sticky notes about steps that may help reach your goal. Post the sticky notes on the magic quadrant at the appropriate levels of impact and effort.
5. Discuss decisions and implications.

Magic Quadrant Example[5]

[4] Gray, D., Brown, S., & Macanufo, J. (2010). Impact & effort matrix. In *Game storming: A playbook for innovators, rulebreakers, and changemakers* (p. 241). O'Reilly.
[5] Public Profit. (2014). *Dabbling in the data: A hands-on guide to participatory data analysis.* https://www.publicprofit.net/Dabbling-In-The-Data-A-Hands-On-Guide-To-Participatory-Data-Analysis

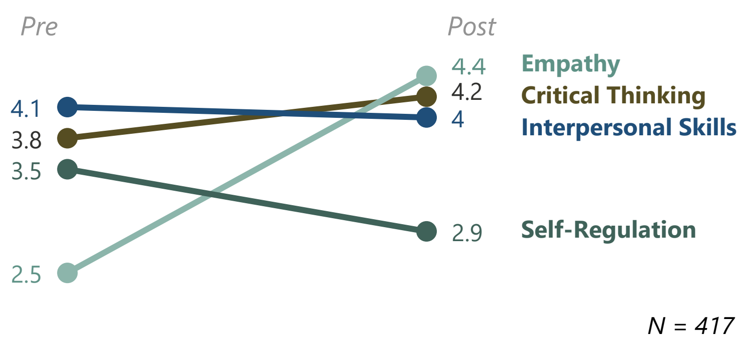
Magic Quadrant	
High Impact/Low Effort	**High Impact/High Effort**
Low Impact/Low Effort	**Low Impact/High Effort**

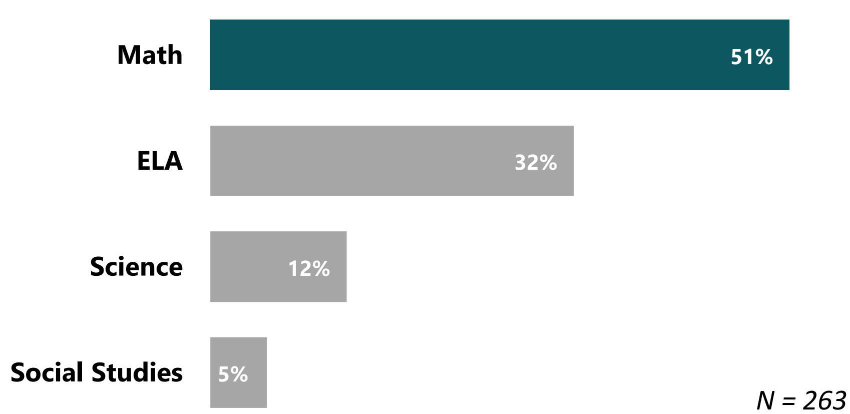
Resource 11. Introduction to Data Visualization

This introduction to data visualization supports recommendations provided on ***page 28 of the*** **Local Evaluation Guide.**

What Is Data Visualization?

Data visualization is an approach to ensure that data are presented effectively for easier interpretation, therefore leading to greater usability. This growing practice is based on brain science of what the human brain can process and retain, and is becoming popular across all fields that report data findings. In education and youth development, it is a particularly powerful tool to optimize program staff's ability to understand and use the data for program improvement. It also is critical for telling the story of successes to a wider audience to enhance sustainability efforts.

<table>
<tr><th>Benefits</th><th>Examples</th></tr>
<tr><td>Good data visualization increases the likelihood of
• The data getting read
• Diverse audiences understanding the data
• The story getting told more
• People retaining what they learned from the data
• Findings being used
• Data being used to improve the program
• Having a participatory evaluation
Principles
Data visualization should
• Be simple and clear
• Provide streamlined information
• Use engaging formats with less text and more visuals
• Reduce clutter and any excess
• Explicitly name findings and conclusions
• Have strategic and bold use of images, color, and so forth
• Use plain language, with high readability and clear visibility
• Tell a story</td><td>Students built social-emotional learning skills in empathy and critical thinking in pre-post testing.
Self-regulation is an area of opportunity for the program's improvement efforts.


Math was most often named as students' favorite school subject.
Science is notably low despite recent focus on STEM.

</td></tr>
</table>

Data Visualization Resources

Charts

- How to Build Data Visualizations in Excel
- Data Visualization Checklist
- Data Visualization Tutorials:
  - Qualitative Viz, and
  - Data Studio Blog
- Data Visualization Chart Selection Tools:
  - Qualitative Chart Chooser,
  - Interactive Chart Chooser, and
  - Graphic-Continuum
- Book: *Effective Data Visualization: The Right Chart for the Right Data*
- E-Book: *Great Graphs*
- Book: *Storytelling With Data*
- Tableau software and the book *Tableau Your Data,* by Daniel G. Murray
- Tamara Munzner, *Visualization Analysis and Design* (CRC Press)

Graphics and More

- Graphic design
- Icons
- Dashboards
- Fonts
- Color: Adobe Color Wheel or Instant Eye Dropper
- High-Resolution Photos: Pexels or Pixabay

Reports

- Evaluation Report Layout Checklist
- Community Solutions evaluation resources
- 1-3-25 Reporting Model
- Evaluation Reporting Guide
- Book: *A Short Primer on Innovative Evaluation Reporting*

Presentations

- The Potent Presentations Initiative
- Audience Engagement Resources
- Book: *Audience Engagement Strategy*
- Valerie M. Sue and Matthew T. Griffin, *Data Visualization and Presentation With Microsoft Office* (Sage)

Resource 12. Introduction to Stakeholder Engagement in Evaluation

This introduction to stakeholder engagement in evaluation supports a variety of recommendations and processes described throughout the **Local Evaluation Guide.**

What Is Stakeholder Engagement in Evaluation?

This beneficial approach ensures inclusivity and participation of key voices beyond the local evaluation team in various parts of the evaluation. By facilitating spaces for stakeholders to play a more active role throughout the evaluation cycle, and especially in the data analysis stage, you ensure that your evaluation is meaningful and representative of your entire program community. The strategies and resources presented here offer support for how to facilitate activities specific to evaluation but also may be useful for other goals as well.

Benefits

Good stakeholder engagement increases the likelihood of

- Diverse stakeholders reviewing the data
- Discovering key insights
- Making meaning from data
- Ensuring data are valid and representative of known realities
- Data being used to improve the program
- Having a participatory evaluation

Principles

Stakeholder engagement should

- Value stakeholder voice
- Be inclusive of diverse stakeholders to weigh in
- Offer engagement opportunities at various time points in the evaluation
- Allow time and space for thoughtful reflection and idea generation
- Make evaluation more meaningful and fun

Throughout the Evaluation

Engaging stakeholders throughout the evaluation is about more than just sending surveys or using stakeholders to collect data. It means facilitating activities to involve people in diverse ways and offer input on the evaluation process itself. It involves finding opportunities for quick input whenever decisions are being made, such as during evaluation planning or later improvement planning, so that power in what happens is shared. It means taking the time to present ideas to all relevant stakeholders and adapting based on what they say.

- *Creative Ways to Solicit Stakeholder Feedback & Creative Ways to Solicit Feedback from Children and Youth*: https://www.publicprofit.net/Creative-Ways-To-Solicit-Stakeholder-Feedback
- *A Practical Guide for Engaging Stakeholders in Developing Evaluation Questions:* hhttps://www.fsg.org/resource/practical-guide-engaging-stakeholders-developing-evaluation-questions-0/
- Book: Michael Quinn Patton, *Facilitating Evaluation*. Sage Publications, 2018

Data Analysis Stage

Participatory data analysis is becoming a best practice to allow for deeper engagement of meaning-making related to collected data. This specific evaluation step allows the chance to bring in a large group of stakeholders to dive into data, analyze, and interpret findings. It requires time for thoughtful reflection to develop key insights and is much more powerful than just the evaluator or evaluation team coming up with all the conclusions. This then arms everyone with the best possible information for taking action.

- *Dabbling in the Data: A Hands-On Guide to Participatory Data Analysis:* http://www.publicprofit.net/Dabbling-In-The-Data
- Data Placemats: https://onlinelibrary.wiley.com/doi/pdf/10.1002/ev.20181 and https://www.slideshare.net/InnoNet_Eval/data-placemats-40494596
- *Participatory Analysis: Expanding Stakeholder Involvement in Evaluation*: https://www.innonet.org/media/innovation_network-participatory_analysis.pdf

Resource 13. Introduction to Strength-Based Communication

This introduction to strength-based communication supports a variety of recommendations and processes described throughout the **Local Evaluation Guide.**

What is Strength-Based Communication?

Strength-based communication is an approach to communication that focuses on the strengths and assets of individuals and groups (e.g., students, parents) rather than on their needs and deficits. Strength-based communication can be an extension of the strength-based approach that youth development programs use with youth and families. It can be used in communications directly with youth and families (e.g., newsletters), in funding proposals, in reports such as the local evaluation reports, in presentations, and on social media.

Using Strength-Based Communication

A few quick guidelines that will help your communication become more aligned with the strength-based approach are as follows:

- Use person-first language. For example, use “students with disabilities” in place of “disabled students.”
- Use active voice. For example, you can change the sentence, “The student was asked to take a survey” into active voice by naming who asked the student to take the survey. With this change the sentence would read: “The site coordinator asked the student to take a survey.”
- Honor self-identification by ensuring that you are referring to individuals or groups in the way that reflects their identity. This is one reason why sharing preferred pronouns is important. If you are unsure how a person self-identifies, it is better to ask than to assume.
- Uphold clarity by using proper nouns as needed. Overly relying on words like “it,” “this,” or “that” to refer to key concepts can confuse people and hide your core message.
- Normalize challenges and emphasize supporting rather than saving people. At some point, we all face challenges and will need support to help us navigate those challenges. Too often, we read a story of a challenging situation that shows that a program “saved” someone. The strength-based approach names the challenge and the support while highlighting the strengths that the person used to become successful.
- Respect and invite the voices and experiences of the people you serve. A strength-based approach seeks to include people so that they have influence over how they are portrayed and how their stories are told. It also allows room for people to share their own stories.

Check out this blog from Prosper Strategies to see a few strong examples of strength-based communication. The Idea Bank developed by Native Education Collaborative offers a more comprehensive example of how to use strength-based communication when talking about a specific community.

Strength-Based Communication Resources

How to Create a Guide to Strength-Based Communication for Your Nonprofit – provides a step-by-step approach to making a tailored guide for everyone in your organization to use strength-based communication.

A Progressive's Style Guide – offers overarching guidelines for using a strength-based approach and includes guidance for using strength-based communication on specific topics such as gender/sex, race/ethnicity, housing/space, and more.

FrameWorks Institute – has developed multiple research-based tools and resources that can help you frame a range of social issues in impactful ways.