

Distilling Evaluation Practice into

43 ESSENTIAL TASKS

Kelly Robertson & Lori Wingate



WESTERN MICHIGAN UNIVERSITY
The Evaluation Center





Introductions



Kelly
Robertson



Lori
Wingate



WESTERN MICHIGAN UNIVERSITY
The Evaluation Center



EvaluATE



www.evaluate-ate.org



Primary Use



Guide EvaluATE's work



Content

7

Task Areas

Management

Engagement

Planning & Design

Data Collection & Analysis

Interpretation

Communication, Dissemination, & Use
of Results

Quality Review



Content

1. MANAGEMENT

Managing an evaluation involves making decisions about allocating and using resources involved in conducting an evaluation, including people, time, and money.

1.1 Assemble an evaluation team—which may include project personnel, external evaluators, and consultants—and determine each member’s responsibilities to ensure competent³ and timely implementation of the evaluation.

1.2 Develop a budget for the evaluation to show how much money will be allocated to various evaluation activities and cost categories within a specified timeframe. Use the budget to guide decision-making about resource use throughout the project.

1.3 Prepare document(s) to formalize the relationship between the evaluator and the project and/or the project’s institution. These materials should address the evaluator’s scope of work, conditions and procedures for compensation, data ownership, and contractual obligations.

1.4 Engage external experts as needed throughout the evaluation to ensure technical quality and contextual appropriateness (e.g., editor, methods experts, subject matter experts, cultural liaison or mediator).

Task Area Statement



Content

7

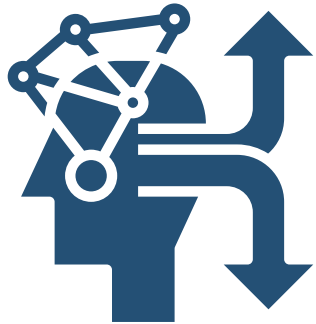
Task Areas

43

Tasks

Tasklist

Decision



or

Action



+

Why



Content

Task = What + Why

NOT \neq ~~How~~ or ~~Whom~~



Content

1. MANAGEMENT

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Task
Statements

Development

Initial Draft



+

Validation Study



Development

Why we chose tasks over competencies:

- Audience include evaluators & non evaluators
- Brief services realistically can only support tasks
- Aligned with how self-directed learners seek guidance
- Only focused on evaluation specific skills

Development

Initial Draft



+

Validation Study





Study

43^{?!?}

Study

1

Task Tracking



Evaluators & Project PIs

2

Delphi



Experienced ATE Evaluators

Study

Task Tracking



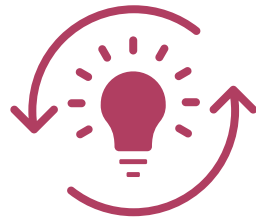
Online Tracking

Fall 2019 – Fall 2020



Video Call

Spring 2021



+ Documenting program changes

+ Seek feedback on reports

+ Prepare to ensure timely access to existing data

Study

Delphi



Online Tracking

Fall 2019 – Fall 2020



Video Call

Spring 2021



Delphi Study

Summer 2021

Study

Delphi



Delphi Study Summer 2021

What changes should be made and why?

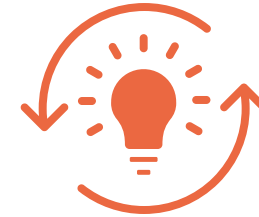
<i>Delphi Respondents' Comments</i>	<i>EvaluATE's Response</i>	
	<i>Comments</i>	<i>Made edit based on feedback?</i>
...determine each member's roles and responsibilities ...to ensure that the evaluation will be carried out in alignment with the Guiding Principles for Evaluators, including systematic inquiry, competence, integrity, respect for people, and common good and equity.	Changed part to "Assemble an evaluation team to ensure competent and timely implementation of the evaluation." – Added footnote to point to AEA Competencies for more info on what "competent" evaluation is.	Yes
Perhaps another word for competent - skilled? The last part of the sentence could be "to ensure the evaluation can be carried out with quality, efficiency, and inclusion of peoples.	We added a footnote that points to the AEA Evaluator Competencies, which speak to a broad of skills. This management task is specifically about using people, time, and money efficiently.	Yes
I think it would be helpful to add additional explanation around what a competent evaluation team could include in task 1.1. For example, it's important to have individuals with the needed methodology training/experience, individuals who understand the context, individuals with the necessary interpersonal skills, etc.	See comment above	Yes
I think it would be important to include "effectiveness" in addition to quality and efficiency. So the sentence may read as follows, "...carried out effectively, with quality and efficiency."	See comment above	Yes
Define key terms (e.g., competent and quality). Add timeliness (i.e., quality, efficiency, and timeliness).	See comment above. We also added a time dimension, as that is a essential management issue	Yes
Competent is nebulous - "Assemble an evaluation team with the education, experience, skills, and cultural competence needed to conduct an evaluation."	We added a footnote that points to the AEA Evaluator Competencies	Yes

Study

Delphi



Delphi Study
Summer 2021



+ Introduction content

+ Item about HSIRB

Eliminated redundant tasks

+ Note about data ownership

Study



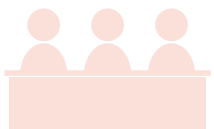
Online Tracking

Fall 2019 – Fall 2020



Video Call

Spring 2021



Delphi Study

Summer 2021



**Diversity, Equity,
& Inclusion**

Review

Winter 2021

Study



Online Tracking

Fall 2019 – Fall 2020



Video Call

Spring 2021



Delphi Study

Summer 2021



**Diversity, Equity,
& Inclusion**

Review

Winter 2021



**Final
Tasklist**

Summer 2022



43^{?!?}



**Yes, there
really are
43 tasks!**



Intended Use



Guide EvaluATE's work

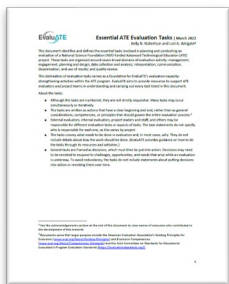


Orient individuals to full range of evaluation tasks

Deliverables

1

Tasklist



View tasklist



Deliverables

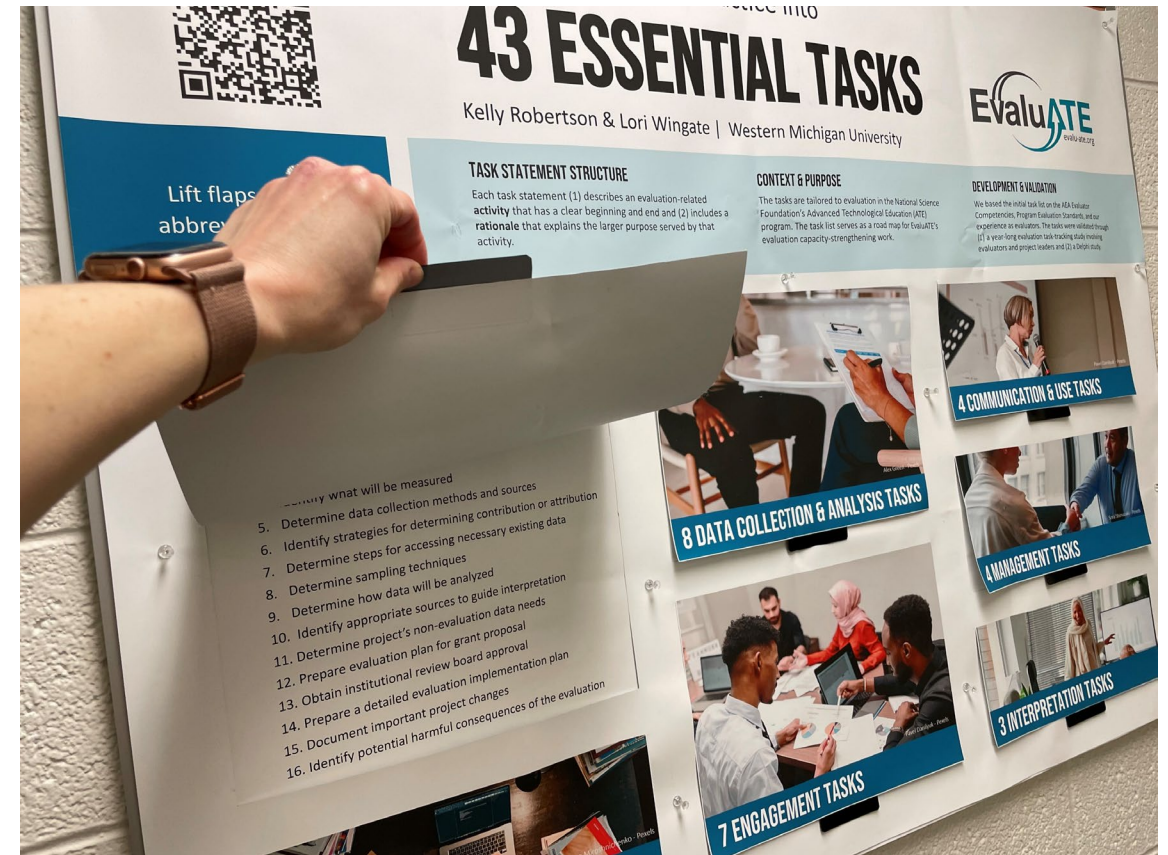
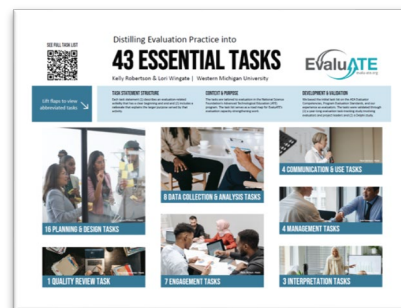
1

Tasklist



2

Conference
Poster



Deliverables

Retaining
participants

Overview
of tasklist
[April 2023]

1

Tasklist



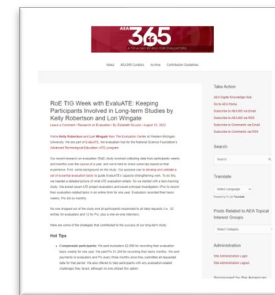
2

Conference
Poster



3 & 4

AEA365
Blogs



Deliverables

1

Tasklist



2

Conference
Poster



3

&

4

AEA365
Blogs



Why focus on
tasks & lessons
learned



5

Article

[Under review]

JMDE
Journal of MultiDisciplinary Evaluation

Acknowledgements

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David Hata

Sondra LoRe

Candiya Mann

Craig McAtee

Adam McKee

Megan Mullins

Carolyn Williams-Noren

Matthias Pleil

Sandra Porter

David Reider

Lisa Shannon

Julie Shattuck

Pamela Silvers

Keith Sturges

Tiffany Tovey

Peggie Weeks

Blake Urbach

Jill Zande

Discussion

