


Evaluation Essentials for Non-Evaluators:
Understanding the Basics and Benefits of Evaluation

Begins at 1 p.m. Eastern



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EvaluATE

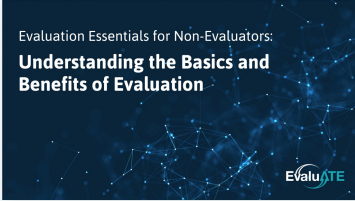
TRAINING COMMUNITY RESEARCH ATE SURVEY

www.evalu-ate.org

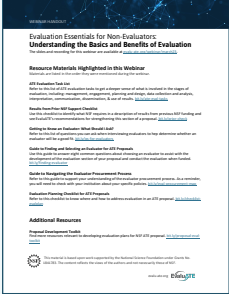


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Materials




Slides



Additional Resources




Recording





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Introductions





Samantha
Hooker





Lyssa
Wilson Becho



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Behind the Scenes



**Maureen
Green**



**Lori
Wingate**



**Carolyn
Williams-Noren**



**Valerie
Marshall**



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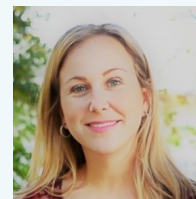
Behind the Scenes & Thank You



**Ellen
Hause**



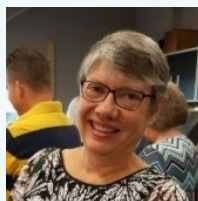
**Elizabeth
Hawthorne**



**Blake
Urbach**



**Elaine
Craft**



**Pam
Silvers**



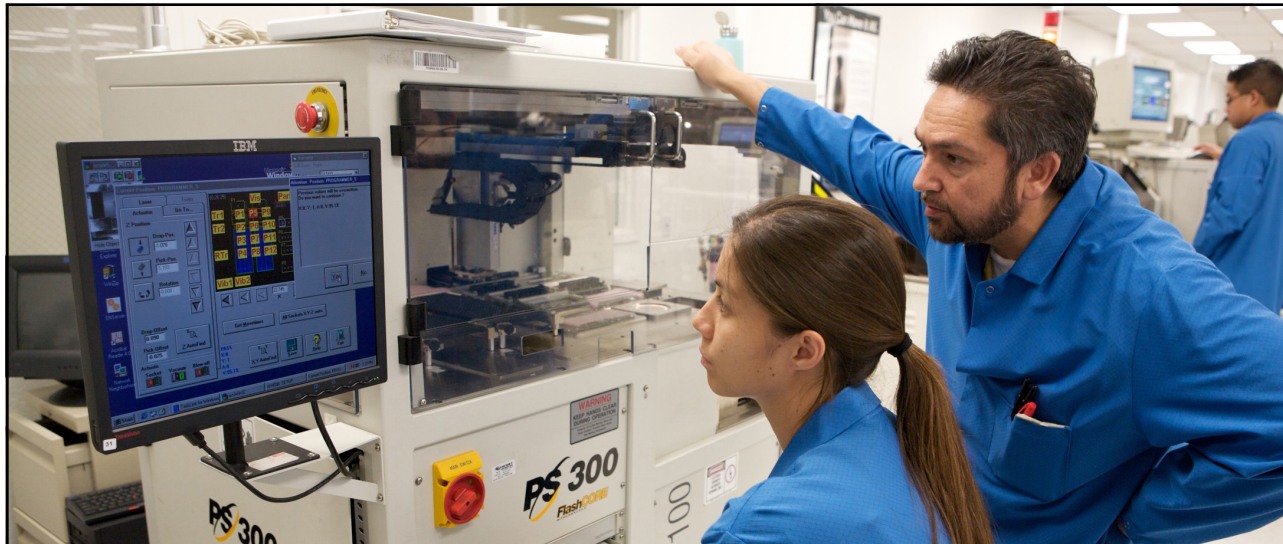
**Emery
DeWitt**



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Advanced Technological Education Program

www.nsf.gov/ate



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This material is based upon work supported by the National Science Foundation under Grants No. 1841783. The content reflects the views of the authors and not necessarily those of NSF.



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Lyssa

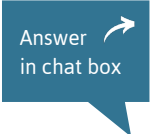


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One Word

CHAT QUESTION

- What is **one** word that comes to mind when you hear **“evaluation”**?




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ATE Program

Advanced Technological Education


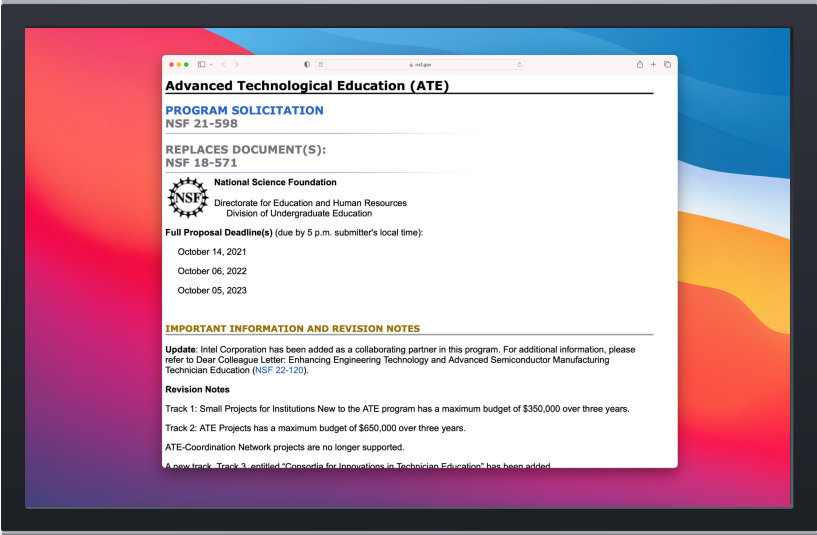
Meet Jen Genericson*



She has a **GREAT** idea for an NSF ATE proposal


*This is a fictional character and project. Any resemblance to actual persons or projects is coincidental.

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Advanced Technological Education (ATE)
PROGRAM SOLICITATION
NSF 21-598

REPLACES DOCUMENT(S):
NSF 18-571

 National Science Foundation
Directorate for Education and Human Resources
Division of Undergraduate Education

Full Proposal Deadline(s) (due by 5 p.m. submitter's local time):
October 14, 2021
October 06, 2022
October 05, 2023

IMPORTANT INFORMATION AND REVISION NOTES

Update: Intel Corporation has been added as a collaborating partner in this program. For additional information, please refer to Dear Colleague Letter: Enhancing Engineering Technology and Advanced Semiconductor Manufacturing Technician Education (NSF 22-120).

Revision Notes

Track 1: Small Projects for Institutions New to the ATE program has a maximum budget of \$350,000 over three years.
Track 2: ATE Projects has a maximum budget of \$650,000 over three years.
ATE-Coordination Network projects are no longer supported.
A new track, Track 3, entitled "Proposals for Innovations in Technician Education" has been added.

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Evaluation: All ATE-funded work must be evaluated, with the exception of planning grants for centers. Project descriptions must include a subsection titled "Evaluation Plan" that includes the following information:

- Aspects of the project that will be evaluated—this is best expressed as evaluation questions that frame the evaluative inquiry or criteria that define the dimensions of project quality that will be investigated. The evaluation should address both project implementation and outcomes. Implementation encompasses the project's activities and deliverables. Outcomes are changes brought about by the project, such as—but not limited to—changes related to student learning, persistence, retention, and graduation.
- The specific data sources, data collection questions or criteria, and how data will be used to draw conclusions about the quality of a project.
- A timeline for the evaluation that identifies the frequency of communication between the evaluator and the project.
- A plan to incorporate summative evaluation.
- Personnel involved in conducting the evaluation and how their responsibilities will be divided between the evaluator and the project.

There must be clear alignment between the evaluation plan and the project's intended outcomes, activities, and deliverables.

It is recommended that the evaluator be named in the proposal and a Biographical Sketch included with the proposal's supplementary documents. If the submitting organization requires evaluation consultants to be selected through a competitive bid process after an award is made, the proposer should note the policy that prohibits noncompetitive selection and describe the procedures that will be used to select an evaluator after the award is made.

Special Information for the Evaluation of Applied Research Projects: Applied research projects may be evaluated by an external review committee, rather than a single external evaluator. Whether by committee or individual evaluator, the evaluation of applied research projects should include review and feedback on data collection procedures, analyses, draft publications, and dissemination plans to ensure quality and enhance the impact of the research.

B. Budgetary Information

Cost Sharing:

All ATE-funded work must be evaluated, with the exception of planning grants for centers.

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? **What is evaluation?**

👉 **Why should I do it?**

💰 **How much does it cost?**

👤 **Who can evaluate?**

🔍 **Where do I find an evaluator?**

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**Strategies and Insights
into Evaluation Plans
for NSF ATE Proposals**

August 9, 1 p.m. Eastern

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

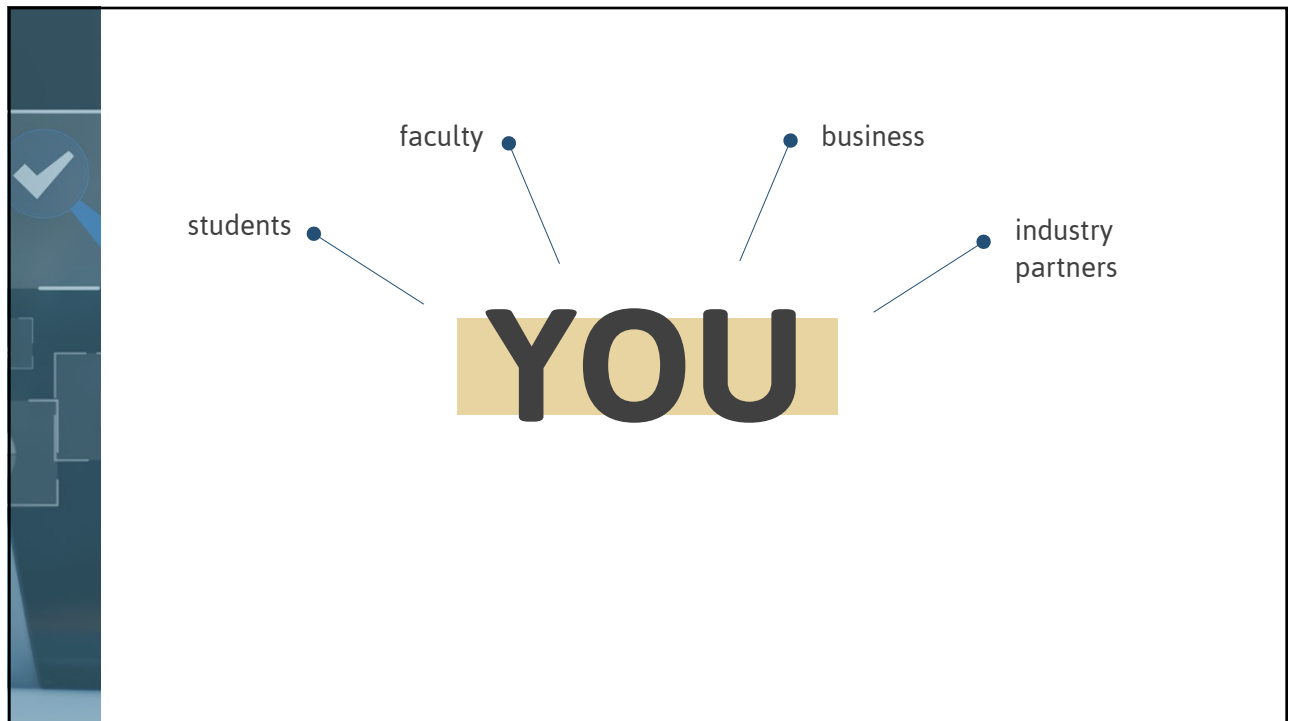
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? What is evaluation?

24



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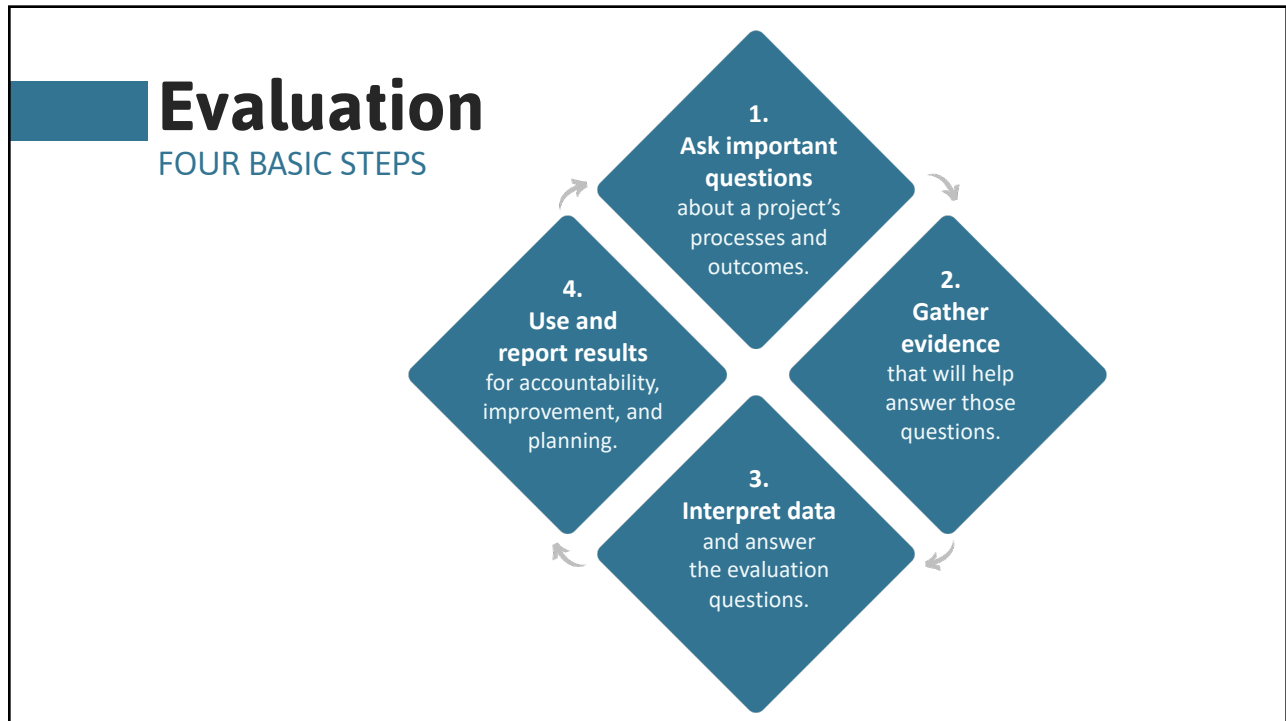


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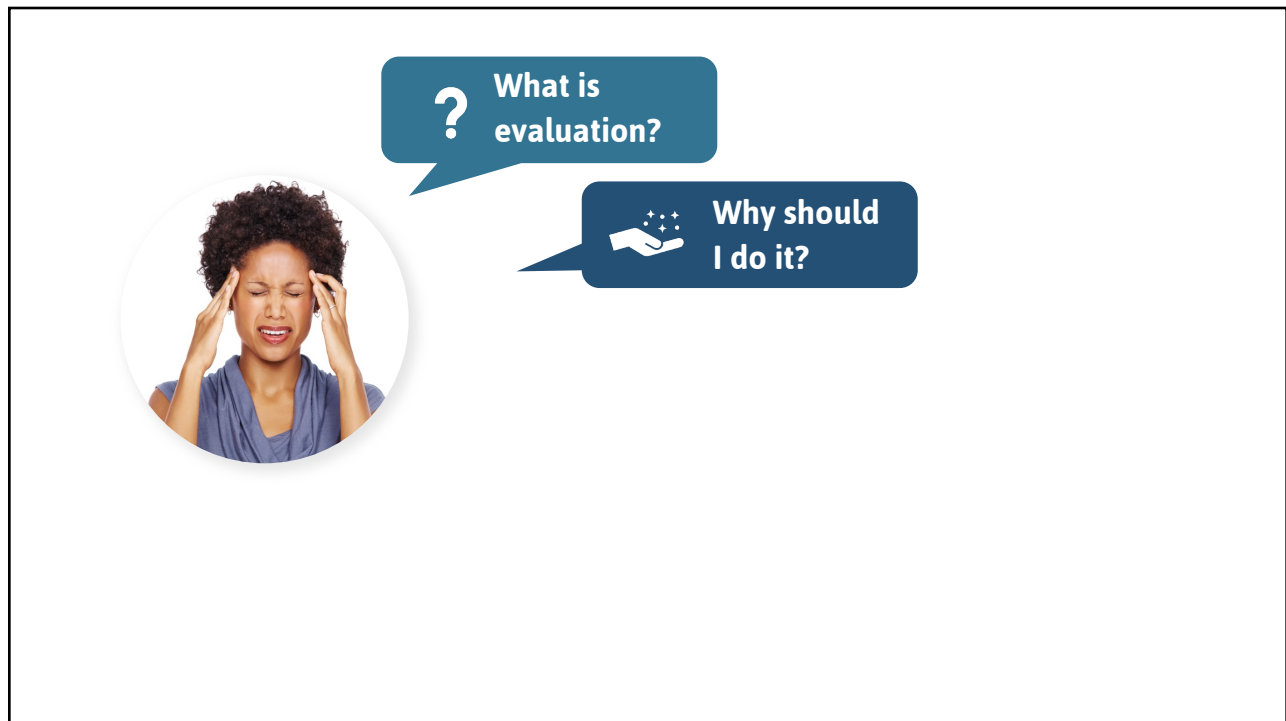


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Why should I do it?

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Improvement

PURPOSE #1

- “The most important purpose of evaluation is **not** to prove, but to **improve**.”

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Improvement

PURPOSE #1

JCSEE Joint Committee on Standards
for Educational Evaluation

- **Utility**
- Feasibility
- Propriety
- Accuracy
- Accountability

Learn more at
evaluationstandards.org/program

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Improvement 
PURPOSE #1

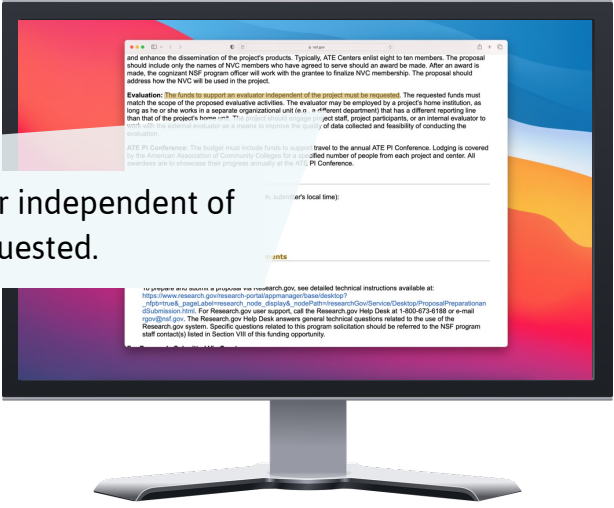
A collage of three images illustrating the concept of improvement. The first image on the left shows two women sitting at a desk, focused on their laptops. The middle image shows a magnifying glass held over a green printed circuit board (PCB), highlighting a specific component. The third image on the right is a smaller version of the photograph from slide 48, showing two industrial workers in blue uniforms and white hard hats reviewing a tablet in a factory setting.

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Accountability

PURPOSE #2

The funds to support an evaluator independent of the project must be requested.



and enhance the dissemination of the project's products. Typically, ATE Centers enlist eight to ten members. The proposal should include only the names of NIVC members who have agreed to serve should an award be made. After an award is made, the cognate NSF program officer will work with the grantee to finalize NIVC membership. The proposal should address how the NIVC will be used in the project.

Evaluators: The funds to support an evaluator independent of the project must be requested. The requested funds must match the scope of the proposed evaluative activities. The evaluator may be employed by a project's home institution, as long as he or she works in a separate organizational unit (e.g., a different department) that has a different reporting line than that of the project's home unit. This proposal should include project staff, project participants, or an internal evaluator to conduct the evaluation.

ATE PI Conference: The budget must include funds to support travel to the annual ATE PI Conference. Lodging is covered by the Research Association of Community Colleges for a specified number of people from each project and center. All members are to showcase their progress annually at the ATE PI Conference.

...submitter's local time)

...nts

...re program area users to propose the research.gov, see detailed technical instructions available at: https://www.research.gov/research-portal/governance/basics/develop?gh=workbook_page%2Fresearch_node_display_node%2F%2Fresearch.gov/research-portal/governance/ProposalPreparation%2F%2FSubmission.html. For Research.gov user support, call the Research.gov Help Desk at 1-800-873-6188 or e-mail rgd@ed.gov. The Research.gov Help Desk answers general technical questions related to the use of the Research.gov system. Specific questions related to this program solicitation should be referred to the NSF program staff contacts listed in Section VII of this funding opportunity.

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Accountability

PURPOSE #2



Research.gov
Annual reports submitted by principal investigators to NSF:

Cover Accomplishments Products Participants Impact Changes/Problems Special Req's

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Evidence

PURPOSE #3

So, did it work?

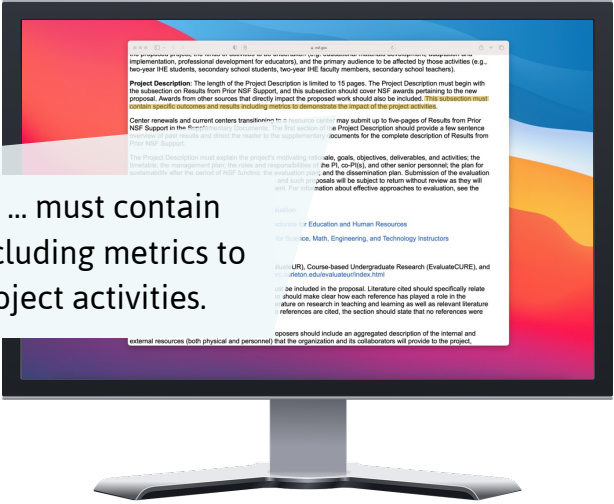


freshspectrum.com

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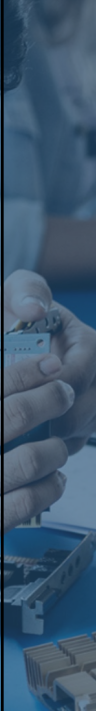
Evidence

PURPOSE #3



Results form Prior NSF Support ... must contain specific outcomes and results including metrics to demonstrate the impact of project activities.

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Which is the best evidence of outcomes?

POLL QUESTION

Example A

The prior project was funded to increase the number of students completing 2-year degrees and entering the technical workforce. Funded activities included developing bridge courses, enhancing recruitment efforts, and developing support resources and strategies for first-generation college students.

Example B


All project objectives were achieved: 150 students enrolled in the new ATE course. 300 first-generation students benefited from newly developed resources aimed at addressing their diverse needs. 400 potential students were reached with new recruitment strategies.

Example C

The average pass rate for targeted courses increased from 62% to 85% (n=325). Student's placement in jobs right after graduation increased from from 55% to 84% (n=250). First generation students said that they felt a strong sense of belonging in the program and received additional support that helped them be successful.

Answer in poll box

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Which is the best evidence of outcomes?

Example A

The prior project was funded to increase the number of students completing 2-year degrees and entering the technical workforce. Funded activities included developing bridge courses, enhancing recruitment efforts, and developing support resources and strategies for first-generation college students.

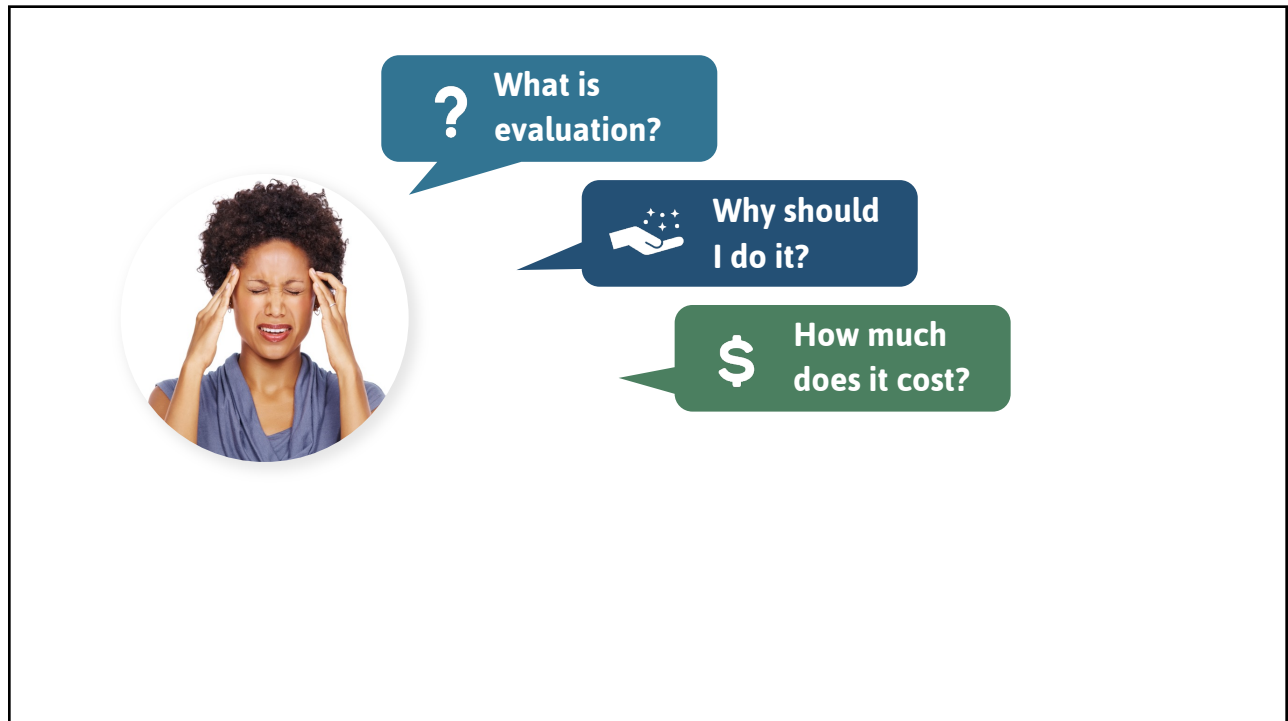
Example B

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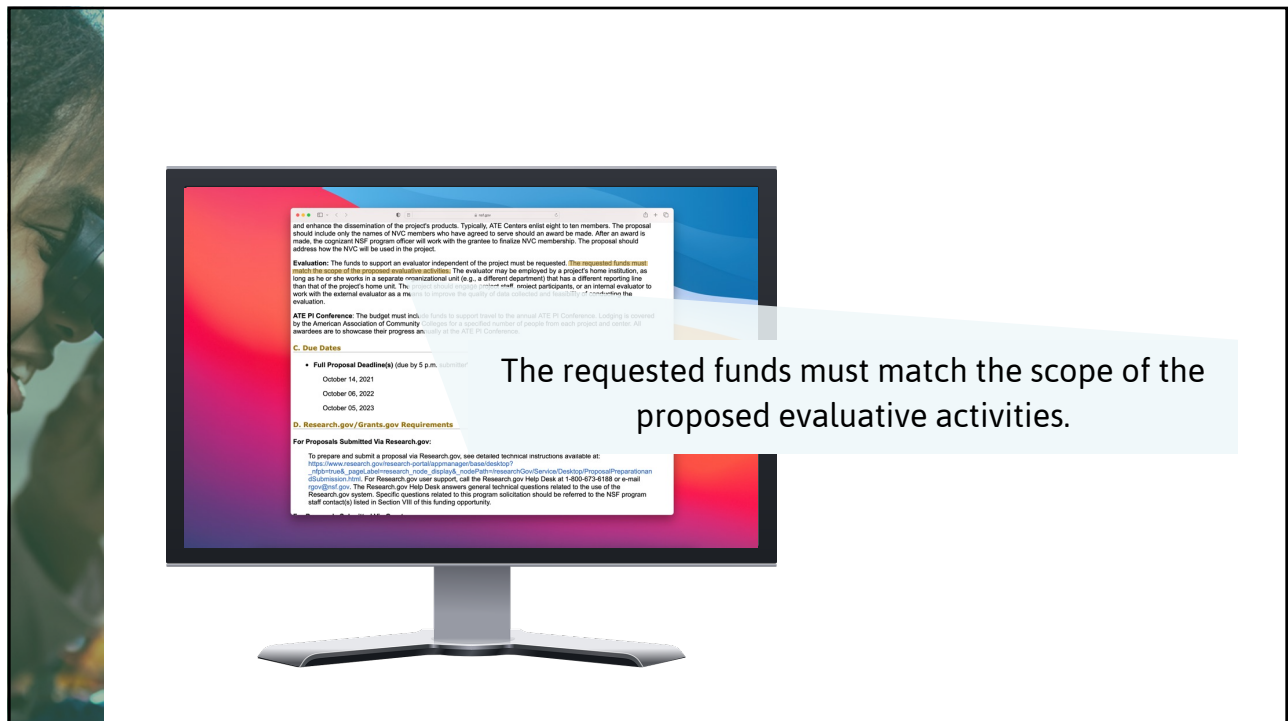
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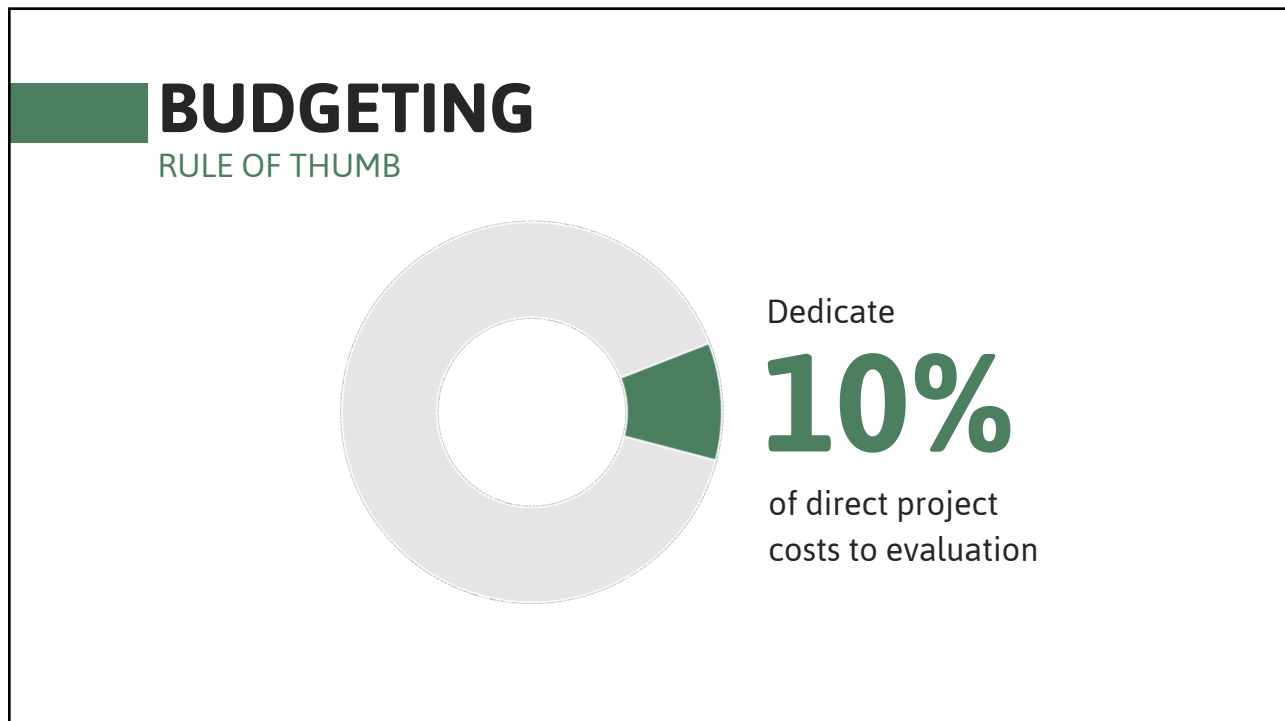
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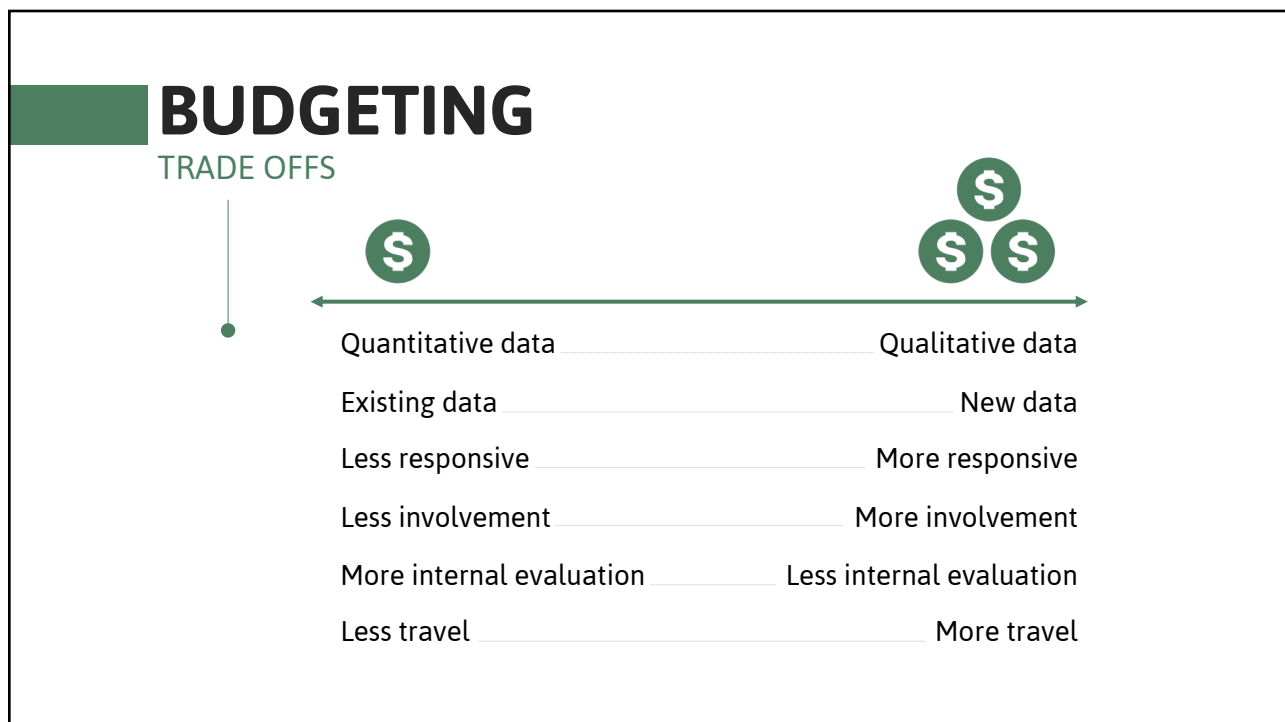
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BUDGETING

EXAMPLE




Total Project Budget:
\$650,000 over 3 years
-\$130,000 for F&A

\$520,000 direct costs

10% EVALUATION BUDGET:
\$52,000 total for 3 years
\$ 17,333 per year

- Evaluator's time
- Travel costs for site visits
- Evaluator's overhead costs

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? What is evaluation?

Why should I do it?

\$ How much does it cost?

Who can evaluate?

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Independent EVALUATOR

The funds to support an evaluator **independent** of the project must be requested.

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What counts as an independent?

Big, Wide World

College

Department

Project


OK if they work in a separate unit

Not OK if they have another role on the project

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Professional EVALUATORS

- **What to look for in an evaluator:**
 - ✓ Experience as an evaluator
 - ✓ Research skills
 - ✓ Communication skills
 - ✓ Understanding of NSF and 2-year-college contexts





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Which evaluator would you recommend?

POLL QUESTION

Evaluator A	Evaluator B	Evaluator C
<ul style="list-style-type: none">• Ph.D., Higher education administration• 10 years of experience leading accreditation teams for technical programs at two-year colleges• Published 5 research articles and 2 book chapters on technical education and student services	<ul style="list-style-type: none">• M.A., Organizational psychology with emphasis in program evaluation• Currently serving as lead evaluator for 25 NSF-funded projects• Recipient of Outstanding Evaluation award from American Evaluation Association	<ul style="list-style-type: none">• M.S., Information technology• Retired dean of technical programs at community college• Received more than \$4 million in NSF grants over 20-year career



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Which evaluator would you recommend?

Evaluator A

- Ph.D., Higher education administration
- 10 years of experience leading accreditation teams for technical programs at two-year colleges
- Published 5 research articles and 2 book chapters on technical education and student services


What is your experience with project evaluation?

- Currently serving as lead evaluator for 25 NSF-funded projects
- Recipient of Outstanding Evaluation award from American Evaluation Association

Evaluator B

- M.A., Higher education administration
- 10 years of experience leading accreditation teams for technical programs at community college
- Received more than \$4 million in NSF grants over 20-year career

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Which evaluator would you recommend?

Evaluator A

- Ph.D., Higher education administration
- 10 years of experience leading accreditation teams for technical programs at two-year colleges
- Published 5 research articles and 2 book chapters on technical education and student services

Evaluator B

- M.A., Organizational psychology with emphasis in program evaluation
- Currently serving as lead evaluator for 25 NSF-funded projects
- Recipient of Outstanding Evaluation award from American Evaluation Association

Do you have time to work on my project's evaluation?

Who would do most of the work and what are their credentials?

Do they have experience with ATE projects?

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Which evaluator would you recommend?

What research methods do you have experience with?

What is your experience as an external evaluator of grant-funded projects?

Evaluator A

- Published 5 research articles and 2 book chapters on technical education and student services
- Recipient of Outstanding Evaluation award from American Evaluation Association

Evaluator B

- M.S., Information technology
- Retired dean of technical programs at community college
- Received more than \$4 million in NSF grants over 20-year career

Evaluator C

- M.S., Information technology
- Retired dean of technical programs at community college
- Received more than \$4 million in NSF grants over 20-year career

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? What is evaluation?

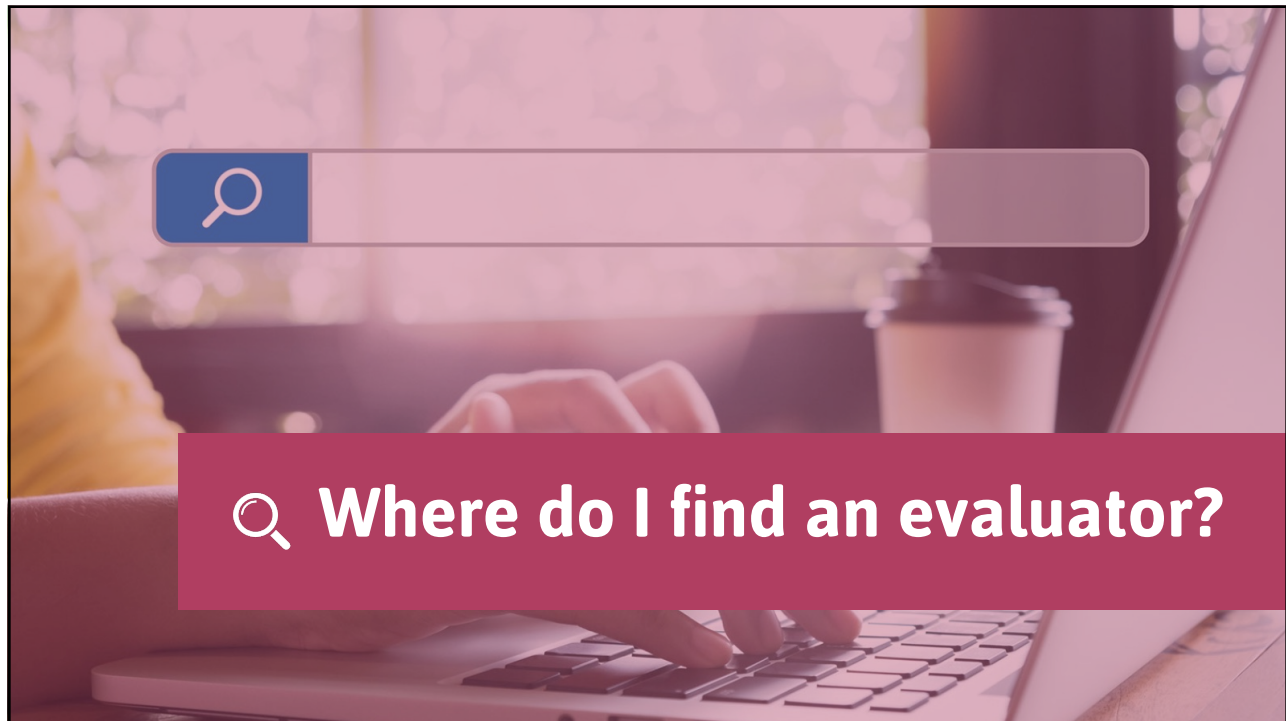
Why should I do it?

\$ How much does it cost?

Who can evaluate?

Where do I find an evaluator?

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Finding AN EVALUATOR

American Evaluation Association (AEA)
my.eval.org/find-an-evaluator

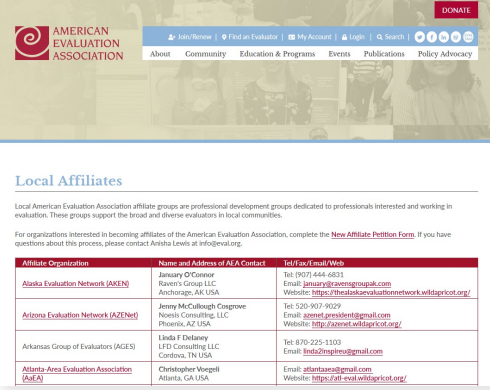
A screenshot of the American Evaluation Association's website. The page title is "Find an Evaluator". Below the title, it says "Use this page to identify AEA members available for evaluation consulting or to serve on evaluation teams due to specific expertise in particular methodologies." The form includes fields for: First Name, Last Name, Evaluator Firm Name, Evaluator Areas Of Expertise, Evaluator Location, and Evaluator State. The state selection is a dropdown menu with options: Alabama, Arizona, California, Montana, Nebraska, Nevada, New Hampshire, and New Jersey.

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Finding AN EVALUATOR

American Evaluation Association (AEA)
my.eval.org/find-an-evaluator

AEA Local Affiliate Groups
eval.org/community/local-affiliates



Affiliate Organization	Name and Address of AEA Contact	Tel./Fax/Email/Web
Alaska Evaluation Network (AKEN)	January O'Connor Raven's Group LLC Anchorage, AK USA	Tel: (907) 444-6831 Email: januar@ravenrsgroup.com Website: https://thealaskaevaluationnetwork.wildapricot.org/
Arizona Evaluation Network (AZENet)	Jenny McCullough Coogrove Novak Consulting LLC Phoenix, AZ USA	Tel: 520-907-9029 Email: jenny.mccullough@gmail.com Website: http://ezenet.wildapricot.org/
Arkansas Group of Evaluators (AGES)	Linda F. Delaney LFD Consulting LLC Cordova, TN USA	Tel: 870-225-1103 Email: linda2019@icloud.com
Atlanta Area Evaluation Association (AAEA)	Christopher Voegeli Atlanta, GA USA	Email: atlantaarea@gmail.com Website: https://atl.aeval.wildapricot.org/

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Finding AN EVALUATOR

American Evaluation Association (AEA)
my.eval.org/find-an-evaluator

AEA Local Affiliate Groups
eval.org/community/local-affiliates

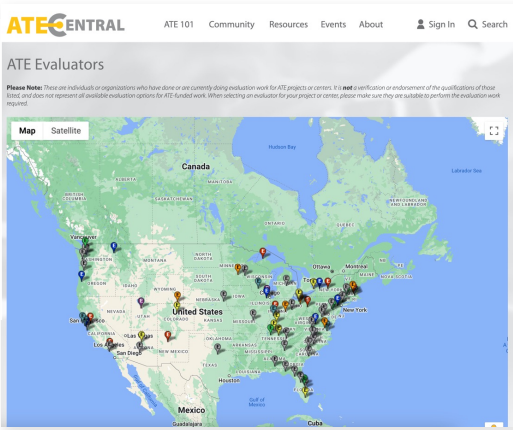
Expanding the Bench
expandingthebench.org/ace/evaluators



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Finding AN EVALUATOR

- American Evaluation Association (AEA) my.eval.org/find-an-evaluator
- AEA Local Affiliate Groups eval.org/community/local-affiliates
- Expanding the Bench Expandingthebench.org/ace/evaluators
- ATE Evaluator Map on ATE Central atecentral.net/evaluators





The screenshot shows the ATE Central website interface. At the top, there is a navigation bar with 'ATE CENTRAL' logo and links for 'ATE 101', 'Community', 'Resources', 'Events', 'About', 'Sign In', and 'Search'. Below the navigation bar is a section titled 'ATE Evaluators'. A 'Please Note' disclaimer is present, stating that the map does not represent all available evaluation options. The main feature is a map of North America with numerous location pins indicating evaluator locations across the United States, Canada, and Mexico. The map includes a 'Map' and 'Satellite' toggle and a search bar.

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Procuring AN EVALUATOR

! STEP 1: Talk with your procurement office at your institution to determine your path.

TWO BASIC PATHS

- Institution policies **allow** you to name an evaluator in your proposal →  **Search for and choose an evaluator**
- Institution policies does **not allow** you to name an evaluator in your proposal →  **Use EvaluATE's resources**

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Resources

WRITING EVALUATION PLANS

EvaluATE Evaluation Plan Checklist for ATE Proposals

Lori A. Wingate | Updated June 2023

This checklist provides information on what should be included in evaluation plans for proposals to the National Science Foundation's (NSF) Advanced Technological Education (ATE) program. Grant seekers should carefully read the most recent ATE program solicitation (<https://bit.ly/nsf-ate>) for details about the program and proposal submission requirements.

Evaluation Plan

ATE proposals must include a subsection titled "Evaluation Plan" within the 15-page project description. EvaluATE recommends dedicating one to two pages to the evaluation plan and including the following five elements:

- 1. Evaluator**
 - Identify the project's evaluator by name and organization.
 - Briefly describe the evaluator's qualifications, including their experience evaluating STEM education programs.
 - Refer to the evaluator's biosketch and letter of collaboration and include these as supplementary documents.
 - If the evaluator is an employee of the project's host institution, explain how the evaluator is independent from the project (they should not work in the same department or be a supervisor or supervisee of project personnel).

If the project's host institution has a policy that prohibits selecting an evaluator at the proposal stage:

 - Explain the institutional policy that does not allow for selection of an evaluator prior to funding.
 - Describe how an evaluator will be selected after the award is made.
- 2. Evaluation Questions**
 - List key questions—ideally, about three to seven—that the evaluation will address.
 - Include questions about both project implementation (what the project does) and outcomes (what changes it brings about).
 - Ensure that the questions align with the project's goals and activities as described in the proposal.
 - Ensure that the questions address the project's intellectual merit (contributions to advancing knowledge) and broader impact (contributions to the betterment of society).
- 3. Data**
 - Indicators**
 - Identify what information will be used to answer each evaluation question (i.e., what will be measured).
 - Data Collection Methods and Sources**
 - Identify how the information will be gathered and from what sources.
 - If relevant, explain sampling and use of comparison or control groups.
 - If using existing data collection instruments, include citations and justify their use.
 - Analysis**
 - Identify the procedures that will be used to summarize quantitative and qualitative data (e.g., descriptive statistics, inferential tests, regression, deductive or inductive coding).
 - Interpretation**
 - Identify sources of comparative information (e.g., baseline data, benchmarks, group comparison; performance rubric; program community members' opinions) and explain how it will be used to answer the evaluation questions.

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Resources

ATE EVALUATION COACHING

evalu-ate.org/coaching



Amy Germuth



Lola Adedokun



Keith Sturgis

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Resources

WHAT'S MY NEXT STEP?

Understand the purpose and value of evaluation to your ATE project

Toolkit for Pre-Award ATE Evaluation
 Essential Steps: Where to Start and What to Do Next
Lysa Wilson Becho | June 2023

The resources in this toolkit are intended to assist for those applying to the National Science Foundation's Advanced Technological Education (ATE) program. The suggested steps below can guide grant seekers and grant professionals through the process of identifying an independent evaluator and developing an evaluation plan. Practical details on carrying out each of these milestones can be found in the associated resources.

PRE-WORK
Understand the purpose and value of evaluation to your ATE project
 Watch this webinar on evaluation essentials for non-evaluators ([link](#)) or refer to this list of ATE evaluation tasks ([link](#)) to get a deeper sense of why evaluation is required in the NSF ATE program and what is involved in each stage.

STEP 1
Know your institution or organization's requirements for procuring an evaluator
 Call your institution's procurement officer, purchasing or fiscal agent, or grants manager to ask about specific policies. Refer to this guide to support your understanding of the evaluator procurement process ([link](#)).

STEP 2A, if you can name an evaluator
Search for evaluators with skills and experience that fit your project's needs
 Use this guide to answer common questions about choosing an evaluator including where to look, what qualifications to look for, and how to compensate them ([link](#)). When interviewing evaluators, refer to this list of questions to help determine whether an evaluator is a good fit for your project ([link](#)). Once you have selected an evaluator, they can begin developing the evaluation plan.

STEP 2B, if you cannot name an evaluator in your proposal due to your institution's policies
Draft an evaluation plan for your ATE proposal
 In cases where you cannot name an evaluator, the grant seeker is responsible for writing their own evaluation plan. Refer to this checklist to know where and how to address evaluation in an ATE proposal ([link](#)). More resources can be found in the evaluation plan toolkit for ATE proposals ([link](#)).

STEP 3
Review evaluation plan with full ATE proposal to ensure alignment
 Read this blog series for tips on developing a strong evaluation plan for your ATE proposal ([link](#)).

STEP 4
Submit your ATE proposal
 Once you receive funding, refer to the checklist for getting started with your evaluation post-award ([link](#)). If you were unable to name an evaluator in your proposal, revisit Step 2A.

This material is based on work supported by the National Science Foundation under Grant No. 1841783. Any opinions, findings, and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the National Science Foundation.

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Resources

WHAT'S MY NEXT STEP?

Know your institution or organization's requirements for procuring an evaluator 1

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Resources

WHAT'S MY NEXT STEP?

Search for evaluators with skills and experience that fit your project's needs

2

or

Draft an evaluation plan for your ATE proposal

Toolkit for Pre-Award ATE Evaluation
Essential Steps: Where to Start and What to Do Next
Lyssa Wilson Becho | June 2023

The resources in this toolkit are intended to assist for those applying to the National Science Foundation's Advanced Technological Education (ATE) program. The suggested steps below can guide grant seekers and grant professionals through the process of identifying an independent evaluator and developing an evaluation plan. Practical details on carrying out each of these milestones can be found in the associated resources.

PRE-WORK
Understand the purpose and value of evaluation to your ATE project
Watch this webinar on evaluation essentials for non-evaluators ([bit.ly/eval-essentials-webinar](#)) or refer to this list of ATE evaluation tasks ([bit.ly/ate-eval-tasks](#)) to get a deeper sense of why evaluation is required in the NSF ATE program and what is involved in each stage.

STEP 1
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STEP 3
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STEP 4
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WHAT'S MY NEXT STEP?

Review evaluation plan with full ATE proposal to ensure alignment

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The screenshot shows the 'EvaluATE Toolkit for Pre-Award ATE Evaluation' page. The title is 'Essential Steps: Where to Start and What to Do Next' by Lyssa Wilson Becho, dated June 2023. The page is divided into sections: PRE-WORK, STEP 1, STEP 2A, STEP 2B, STEP 3, and STEP 4. A blue circle with the number '3' is positioned over the text 'Review evaluation plan with full ATE proposal to ensure alignment'. The content of Step 3 is highlighted in a light blue box. At the bottom left of the page is the NSF logo and a disclaimer.

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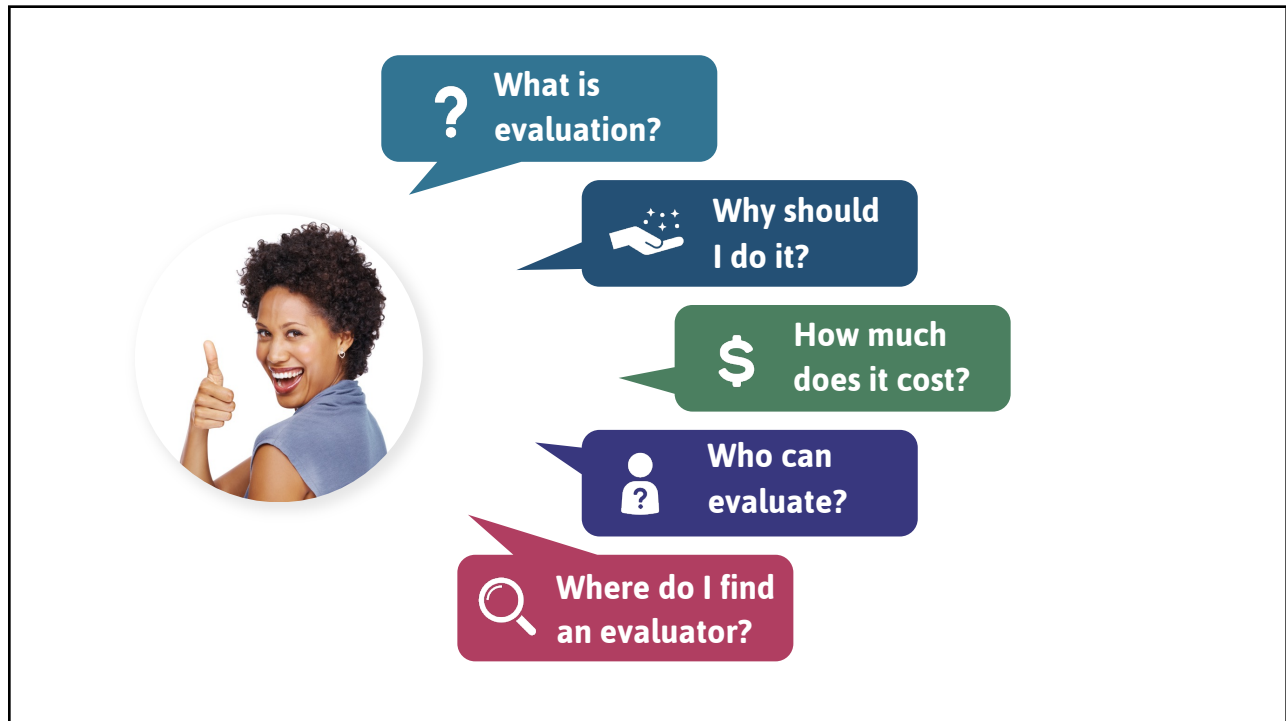
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A woman with curly hair, wearing a blue top, is shown in a circular frame giving a thumbs-up gesture. To her right are five speech bubbles, each containing a question about evaluation. The bubbles are colored blue, dark blue, green, purple, and red.

- What is evaluation?
- Why should I do it?
- How much does it cost?
- Who can evaluate?
- Where do I find an evaluator?

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A dark blue background with a network of white and light blue dots connected by thin lines. The word "QUESTION" is written in large, bold, white capital letters, with "BREAK" in smaller white capital letters below it. In the bottom right corner, there is a white speech bubble containing the text "Use chat window" and a right-pointing arrow.

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**Strategies and Insights
into Evaluation Plans
for NSF ATE Proposals**

August 9, 1 p.m. Eastern



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