

CASE BRIEF: CASE STUDY #9, JACKIE ADAMS

1. *Who* is/are the decision maker(s) in the case (you might be one of them) in terms of the work that you are responsible for? (Be sure you include **WHY** you think someone is a decision maker – what is your evidence?)
 - Ray DeMilo – he is my boss, and he directs my work (he’s just given me an assignment to develop a detailed evaluation plan for the grant-funded project I’m working on, due in a month); he also wrote the proposal for the grant project I’m currently working on, and as such he is ultimately responsible for the outcomes of the grant project
 - The funding agency may eventually come into play as a decision-maker – when they come to evaluate the project next year, they’ll make a decision as to whether the project is meeting its objectives and having the intended impact; ultimately, their assessment of our project may affect our ability to secure funding for future grant projects
2. *What* appears to be the primary issue(s) (concern, problem, challenge or opportunity)? What has happened or what situations have arisen because of this issue(s)? (Be sure to provide evidence from the case or your reasoning here)
 - Four months into the project, new legislation was introduced that requires all federally-funded projects (like ours) to have a detailed evaluation plan for performance assessment (more detailed than what was submitted with the grant proposal), BUT –
 - I have never written an evaluation plan;
 - We’re just getting started, and I think that we (the subject matters experts and I) are making good decisions about designing in-service workshops for our target audience and to meet the goals & objectives of the project, but I don’t feel quite ready to think about assessing outcomes of these workshops; and
 - I don’t have a background in quality (except for that brief, disastrous experience with TQM in the mid-1990s), so I’m having difficulty translating the evaluation plans Ray included in the grant proposal into a more detailed plan
3. *When* do I have to decide, resolve, act or dispose of this issue(s)? Is there urgency? (Provide evidence from the case)
 - Ray has given me a month to develop this evaluation plan and submit it to him
4. Have I (or others) already taken any steps to resolve the issue(s)? If so, what are they? Have they been successful – why or why not?

Case Brief: Case Study #9, Jackie Adams

- Ray included a brief evaluation plan in his grant proposal – it will provide the basis for my evaluation plan (but first I have to understand what he’s talking about)
- Ray’s plan was successful in the sense that we got the grant funding, but it was short on details regarding the actual process (what we will actually do), so that’s what I’ll need to address in my plan

5. Specifically *how* will you proceed from here? For each point, be sure that you provide the reasoning behind your thinking and how it directly links to the primary and secondary issues you have identified. Be precise about how you will proceed – what will you do first, second etc.

- First thing I need to do is bone up on quality systems – are there existing standards or frameworks I can use? What are the accepted practices for evaluating such systems? What is a quality audit? Ray emphasized quality systems as a means of evaluating and continuously improving AMTE’s operations, so if this is to be the basis of our evaluation plan, I need to find out more about it before I can proceed.

I’ll ask Ray if he can suggest some resources to help me with this, maybe a few articles or some examples – he notes in his proposal that the use of quality systems in settings like ours is growing rapidly, so he’s likely been reading up on it as well, and can point me toward a few good articles on the subject. The subject matter experts I’ve been working with may also have some suggestions (and, of course, I can check out the university library, perhaps get one of the librarians to help me identify some pertinent readings).

- Next thing I need to do is review evaluation frameworks, decide which one(s) might be appropriate, and when to use them. Ray’s proposal proposes to “establish a comprehensive quality system, which will cover elements such as documentation, implementation, review, and correction for all activities having a bearing on the quality of the information, and services and activities supplied by AMTE.” This project is “focused specifically on teacher enhancement as a means of advancing technology education” and seeks to provide faculty education to 100 science, math, and technology educators in each year of the 3-year grant. It seems to me there are several levels of evaluation about which I need to be concerned in developing my plan:
 - the overall effectiveness of the program – evaluating the end result will require some form of summative evaluation; the funding agency will be looking at our overall results in relation to the objectives we set initially, and be looking for both efficiency (did we use the grant funds well?) and effectiveness (what is the impact of the project?) – and so will we

- the overall effectiveness of the training and materials – employing formative evaluation throughout the development of the workshops and training materials will help ensure their overall effectiveness; I admit that this is an area I’ve been slow to develop – I feel like the work I’ve done with the subject matter experts so far is pretty effective, but I have no evidence to back it up; re-reading Ray’s proposal tells me that I need to get on this, however – it’s all part of the continuous improvement cycle that Ray talks about
- the overall effectiveness of the training – getting feedback from the instructors who’ll be getting the training, as well as from those who’ll be conducting the training, also feeds into the continuous improvement cycle. And I probably need to think about how I’ll follow up with how the faculty going through the training are implementing these ideas in their classrooms, perhaps do some data collection with the students (although it will be impossible to do this for all 300 instructors!); this will give us more evidence of the effectiveness of the training

The framework that seems to make the most sense for me is Stufflebeam’s CIPP Model; I found a great checklist on the web¹ that can help me think about the details of the process, from evaluating context (needs assessment, program planning – where we are now) through input (program structure), process (formative evaluation) and product (summative evaluation).

I want to be sure that I include both one-to-one and small group evaluation in the development of the workshop materials; the field testing will take place in the first (and subsequent) round of delivering the workshops.

In evaluating the actual training, I’ll want to bring a little Kirkpatrick to assess both faculty reaction (attitudes) and their learning, and plan to evaluate transfer when I interview them after they’ve had a chance to implement what they’ve learned in the workshop in their own classrooms.

But above all, I need to make sure that whatever evaluation processes I put into my plan are compatible with the quality assurance framework that Ray outlined in his grant proposal, and that I outline “a well-defined and agreed-upon standard for evaluating and continuously improving AMTE’s operations.” In other words, it can’t just stop at designing and delivering some workshops – the program needs to be continuously evaluated and corrected as appropriate and necessary.

¹ Stufflebeam, D. L. (2002, June). *CIPP evaluation checklist: A tool for applying the Fifth Installment of the CIPP Model to assess long-term enterprises*. Retrieved from Western Michigan University, The Evaluation Center Web site: <http://www.wmich.edu/evalctr/checklists/cippchecklist.htm>