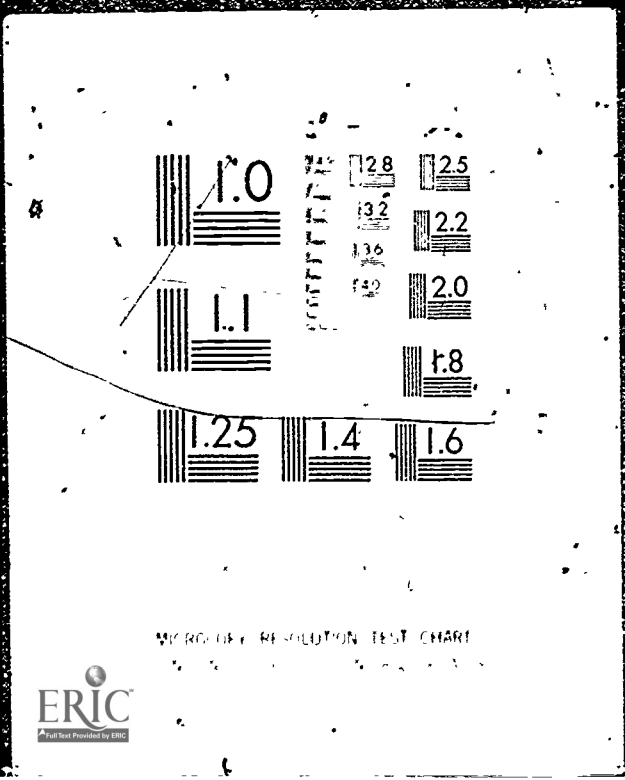

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ABSTRACT.

This report is intended to provide a history of the development and evaluation of a set of training materials. The goal of this unit is to help school staff develop an understanding of the knowledge and skills necessary to identify, collect, organize, and analyze information useful in making decisions about program modification. The unit deals with the following topics: (1) identifying decisions to be made about program modification, and specifying who makes these decisions; (2) identifying alternative courses of action for decisions in the instructional management area; (3) determining what information is relevant to modification decisions; (4) taking responsibility for or contributing to a plan for program modification information; and (5) analyzing and reporting information. Described in this report are the parts of the unit, the program of development, testing, and field tests. A review of the unit by two specialists is summarized. (Author/MLF)

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Development and Evaluation of

Evaluation for Program Improvement

in the

Far West Series in Instructional Planning

February 1975

Educational Management Program

Far West Laboratory for Educational Research and Development
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FOREWORD

This report is intended to provide a history of the development and evaluation of one of the products produced by the Educational Management Program. Reference is made in the body of the report to more detailed reports or memoranda which document the development and testing procedures used. All of these documents are in the program files, and many of them have been submitted to various funding agencies that have supported the program work.

The report has been written primarily for those associated with the National Institute of Education, and possibly some potential users of the product, who need to make judgments about product quality but don't have the time to become familiar in detail with the product itself and the extensive reports prepared during the development and evaluation of the product. The history of development is described only in sufficient detail to suggest the amount of thought, care, and discipline that went into creation of the product. Evaluation information obtained during development is presented at a level that would accurately reflect the strengths and weaknesses of the unit. There is no separate detailed technical evaluation report for this unit, but all of the data and documentation are available in the program files.

Richard W. Watkins
Program Director
Educational Management Program

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The Development and Evaluation of Evaluation for Program Improvement

Evaluation for Program Improvement is one of six sets of training materials developed to increase the skill, knowledge and understanding of school personnel in the area of instructional planning and management. Instructional planning is defined generally as that area of educational administration that is concerned with providing educational opportunities for children. This area may be further defined as involving the establishment of instructional program purposes, the design and implementation of programs, and the evaluation of instructional programs. The materials in Evaluation for Program Improvement are directed to the second of these three functions.

Intended Users

These materials are designed for those school personnel who are directly responsible for deciding whether, and what, parts of an instructional program should be altered to increase the usefulness or effectiveness of the program. The specific role titles of such staff will vary from district to district, but most often will include building principals, department heads, district curriculum specialists, and teachers who are serving on curriculum committees. Depending on the size and organization of a school district or system, the unit may also be found useful by district office administrators other than those with direct curriculum responsibilities, Board of Education members, parents and students. It should be clear that the intended user group can best be defined by function and interest rather than by a particular role or title, and that the group could include staff not necessarily falling under the heading of administrators.

Product Purposes and Description

The goal of this unit is to help school staff develop an understanding of the knowledge and skills necessary to identify, collect, organize and analyze information useful in making decisions about program modification. The unit deals with the following topics:

1. Identifying decisions that are both necessary and feasible to be made about program modification, and specifying who makes these decisions;
2. Identifying alternative courses of action for decisions in the instructional management area;
3. Determining what information is relevant to modification decisions;
4. Taking responsibility for or contributing to a plan for collecting, organizing and analyzing program modification information; and
5. Analyzing and reporting information.

This unit is designed to be used in five sessions of three hours each although some variations are possible to reduce the time required. Much of the unit is based on an actual evaluation project and is presented in the form of simulation exercises involving role playing. Session I, "Introduction to Program Evaluation," presents an overview of evaluation in general and program evaluation in particular. It introduces a five-step evaluation process along with activities for learning how to use this process. Audio-visual materials, exercises and written material are used to promote participant interest, involvement and discussion.

In Sessions II, III, and IV, the participants are divided into teams of six to eleven people and asked, through role playing, to simulate the

activities of an evaluation committee that is faced with the problems encountered in the actual evaluation project. After each simulation exercise, the participants discuss what occurred in the meeting of their "evaluation team" and then review a description of what took place in the actual evaluation project at this stage.

In Session II, participants identify decisions, decision makers and alternative courses of action for the simulated evaluation project. Session III continues the simulation exercise. Participants identify what information the decision maker will need in deciding on suitable courses of action and suggesting what instruments could be used to gather this information. In Session IV, participants plan for the collection, organization and analysis of information, and consider how to draw conclusions from the information and make useful recommendations to decision makers. In the final session, participants draw on their experience in the simulations to analyze and criticize the actual evaluation design and final report.

Reading material to be covered between sessions is included as preparation for the next session. Much of this material is drawn from the report on the actual evaluation study, although portions of other publications that are particularly relevant are also used. An annotated bibliography is included in the materials for each session for those who may wish to pursue particular evaluation issues in more depth than is possible in the time available in the training workshop. Finally, the unit includes a fairly extensive bibliography organized in four categories: other evaluation training materials; general references on evaluation; sources for measurement instruments; and general references on educational measurement.

Use of the unit requires a coordinator who has quite an active role as organizer and, to a lesser extent, as discussion leader. There is a separate

Coordinator's Manual as well as transparencies and a filmstrip and cassette tape. Successful use of the unit may require two or three days for the coordinator to become familiar with the materials prior to first use. The coordinator need not be an evaluation or measurement specialist, but it would be most helpful if the material in the annotated bibliography has been read prior to the workshop. If the coordinator does not accept the decision oriented approach to evaluation underlying the unit, it may interfere with the success of the workshop.

Development and Testing

The Educational Management Program evolved from an earlier program of the Laboratory concerned with creating an awareness and greater utilization by school staffs of the results of research and development effort. As work on this earlier program was being carried out, the need to assist school staffs in clarifying their goals and objectives became increasingly clear. The development of a training unit on goal setting, objectives and evaluation was first identified in the proposed scope of work to be completed in 1970 (Far West Laboratory, September 1969, pp. 80 ff.). As the plans for this unit were worked out in greater detail, it became evident that more than a single unit would be necessary. Prototypes and field test forms of two units, Deriving Goals and Analyzing Problems were developed in 1970. The plans for a third unit, Objectives and Evaluation were described in general terms to be included in the scope of work for 1971 (Far West Laboratory, September 1970, pp. 50 ff.). During the summer and fall, however, Banathy and Jenks were completing the conceptualization of an instructional planning and management system. At this conceptual level, separate training units, one on deriving objectives and one on program evaluation, were identified. The former fell under the general heading of program purposing, and included planning for program monitoring; the latter fell under the heading of program management, and included both evaluation for

program modification and evaluation for final decision making.

First unit prototype. The development of a separate unit on deriving objectives was initiated in January 1971; planning for program evaluation in relation to the objectives was not included within the definition of the unit objectives. Conceptualization of, and detailed planning for a separate unit on program evaluation was started in the spring of 1971 and presented in detail in a staff paper (Harris, August 1971). The initial plans for the unit were derived from a systems analysis approach to evaluation in which the evaluation subsystem consisted of four separate functions: defining indicators of objectives and setting standards; collecting data; analyzing data; and identifying necessary program adjustments. Very detailed behavioral objectives for each of these functions, or elements of the evaluation subsystem, were stated, and the objectives for the unit were in effect to enable trainees to achieve these functional objectives. Five kinds of program evaluation were also identified: design; implementation; process; outcomes; and costs.

Two major unit organizations were analyzed in detail, one using the functional approach and the other using the program evaluation types approach. The functional approach was seen to result in a shorter unit that, if successful, would impart more generalizable skills and knowledge. It was, however, decided to organize modules around the types of evaluation even though it would require much greater effort. There were three reasons for this choice:

1. It was more nearly consistent with approaches used by others in the preparation of evaluation training materials and particularly consistent with the approach being followed by the Center for the Study of Evaluation at UCLA. This meant that the new unit could make use of existing materials, or could refer users to existing programs, rather than developing an entirely new unit.

2. The skills and knowledge would be more immediately applicable to the solution of school evaluation problems.

3. The unit could be developed in a modular fashion so that users could choose training for a particular type of evaluation that they perceived to be most relevant to their problems.

The plans were put into effect, and a prototype version of the unit completed (Far West Laboratory, September 1971, pp. A 48-49; Harris, October 1971). The prototype unit was composed of an Introductory Overview module, and five additional modules, each directed to one of the five types of evaluation. Because of the modular approach, the unit materials were very voluminous and complex. Planning for the evaluation of an actual externally developed high school political studies program in a school district by a committee of school staff was used as the basis for the unit. There was a considerable amount of programmed learning used in the unit; but the burden of the training was communicated through lengthy comments by an external evaluation consultant working with the committee, which were to be read by the trainees during the training sessions. A systems analysis approach to evaluation was stressed, and attention given to the possible uses, similarities and differences of various models of evaluation.

The overview and each of the five independent modules were distributed for review to Laboratory staff and selected practicing school personnel. Generally, the Laboratory staff members considered the content of the modules to be quite good, but had some reservations about the format and wordiness of the presentation. The external school reviewers judged portions of the various modules to be quite useful. They were, however, rather negative about the form and length of presentation and quite critical about the general didactic tone of much of the material. They felt that some parts of it were insulting and that the structure of the modules forced them to spend a large amount of time going through material they already knew in order to learn the new material. They also questioned the usefulness to school staffs of some of the content of the unit.

Unit replanning. At the time the prototype test was being completed,

there were several changes in personnel unrelated to the development of the unit. In view of the overall reactions of the school based reviewers of the unit, the decision was made to undertake a replanning effort that would be based on field based interviews with school staff. The interviews were to include those who had responsibilities specifically for evaluation activities, building principals, teachers and curriculum specialists. An initial interview study was conducted by a staff member trained in sociology and was carried out in two school districts: Oakland and Novato, California. The former district is a large urban district that had a number of ESEA Title I projects with a heavy emphasis on evaluation; the latter is a suburban district that had several innovative projects under way in the schools. The information gained from these interviews was presented in a staff paper (Cassells).

Following this initial effort, a number of evaluation specialists were asked to nominate exemplary evaluation projects they knew had been conducted. The staffs of these projects were contacted and many were subsequently interviewed. The purpose of these interviews and observations was to learn who did what, and how, in these exemplary projects and also to learn what the various participants in the projects would like to have done differently. It should be emphasized that these various interview studies were not conducted in any kind of systematic way. They were rather hastily arranged efforts to gain a better understanding of the self-perceived needs of school staff for preparation that would help them in collecting and using information about school programs so that a revised evaluation unit could be planned to respond to these needs.

The information obtained in this fashion was summarized in a planning paper that also set forth the purposes and general outlines for a unit that

would most likely be seen as helpful by school staffs (Educational Management Program, June 1973). The proposed unit had two major goals, with sets of goal indicators, and with even more detailed objectives derived from the goal indicators. The first major goal might be seen as dealing with what is often called formative evaluation, and the second goal seen as dealing with the general area of summative evaluation. The idea of collecting information that would be useful to people who had to make program decisions of various kinds underlay the general plans for the unit at this time.

Initial work on this reconceptualized unit was started, recognizing that the two major goals of the unit and the related objectives were highly interactive. That is, while the goals and objectives for a unit might be separable into formative and summative evaluation, in practice the activities and accomplishments of school staff that contributed to these two kinds of evaluation were not, and the unit probably could not be neatly divided in this way.

Second unit prototype. Drafts of the material for four three hour training sessions were completed, drawing heavily on information and experience gained in an actual school evaluation project where the author of the draft had been involved as an external evaluation consultant. Insofar as possible, the planning team approach was used in the unit, but with a strong emphasis on active trainee involvement through role playing as members of the evaluation team.

These drafts were used in four class sessions of a graduate course in Curriculum Evaluation being conducted at California State University, San Francisco (CSUSF). Virtually all the class members were practicing teachers, counselors or administrators. Program staff members served as observers of these sessions, and written questionnaires and comments were obtained from the participants. Two major conclusions were reached as a result of this

first trial: First, while several of the role playing sessions worked moderately well, success depended very markedly on the fortuitous composition of the role playing groups, and once the role playing and simulation broke down it was difficult to get things going again. Second, and even more important, the participants did not seem able to deal with the idea of decision making in any systematic fashion, nor was there any common acceptance of the idea of program evaluation as opposed to teacher or student evaluation.

Three independent analyses showed that approximately half of the objectives identified in the planning paper had been covered by this first draft of material. At about this time (November 1973) the staff was informed of the planned termination of the program in one year, with greatly reduced funding. The decision was made, therefore, to focus as much as possible on the formative evaluation goal of the unit.

First field test version. Following this prototype test, material for a completely new first session was prepared and tested separately in a class at CSUSF. This material was designed to introduce participants to the ideas of decisions, decision makers, contributors to decisions and factors that affect decisions. The first draft appeared to be useful but also in need of further revision.

The materials for what were now five proposed sessions were extensively revised and edited, and supplementary readings for each session chosen and annotated. As soon as the revised materials were completed in draft form, seven people who had had a variety of school staff experience were asked to go through the unit in five successive half-day sessions in July 1974. A program staff member served as coordinator, and at the end of each half-day session, the participants offered detailed and useful critiques of the material. Many of their suggestions were incorporated in the materials used in the next field tests.

Arrangements for two field test sites to be used in August of 1974 were

made. One of these was a one week experimental summer school graduate course at CSUSF. The other was a four day workshop sponsored as part of the Professional Development Program (PDP) of the Association of California School Administrators (ACSA), and held at Marymount College in Palos Verdes, California.

The experimental summer school course was one of two offered at CSUSF during the same week, one in the morning and one in the afternoon. Only four people registered for the evaluation course in the afternoon. Having been in the course on program design in the morning, they were fatigued and relatively unmotivated by the time they came to the afternoon session. By and large, the field test was not successful when judged as a field test, primarily because of these administrative considerations. The staff had, however, contracted for a non-staff observer to attend the five sessions and to assess the usefulness of the materials for each of the five sessions. Subject to the limitations of the field test situations, his written interlinear suggestions and report were quite useful in subsequent revisions. Three of the four participants judged the workshop to be "fair" and one judged it to be "good." None described it as "excellent" or "poor," but free response comments were generally negative.

The same version of the materials was used in the ACSA sponsored workshop, but since only twelve hours were available, the coordinator had to combine portions of the third and fourth sessions into a single session. The time limitation prevented collection of detailed information about effects of unit use, but participants were asked to give overall reactions and opinions about strengths and weaknesses of each session. Additionally, a program staff member observed the entire workshop to identify potential problem areas. The workshop coordinator was a Laboratory staff member not previously familiar with the unit.

The workshop participants were school staff members who chose this

particular training from among five different "courses" offered by the Professional Development Programs. Twenty people completed the workshop. One was a teacher, nine were principals, four were district superintendents and six classified themselves as "Other Administrative Positions."

Fifty percent of the participants described the workshop as "excellent" and forty-five percent described it as "good." One person described it as "poor" and said he thought the use of role playing was a very poor device. Of those who had had no experience in evaluation, two-thirds judged the workshop as "excellent," and the other third judged it to be "good." Forty-five percent said the material was "moderately difficult," and forty-five percent said it was "moderately easy." Two people said they thought it was "too easy." Those with no experience in evaluation rated the unit as somewhat more difficult than did those who had had experience.

At the end of the workshop, participants were asked if they would be interested in conducting a field test of the unit in their district. Six of them responded positively. In follow-up contacts, only one superintendent was able to arrange for staff participation in a field test. He recommended that a county office sponsor the field test so that some of his staff could participate. When arrangements were made, the superintendent provided released time for four department heads and a curriculum specialist and paid their travel and lodging expenses for a two and a half day workshop. The other five who had indicated interest in field testing were unable to schedule field tests within the limits imposed by the program contract schedule, but several also expressed reservations about their own preparation as coordinators.

Second field test version. The experience, information from participants and staff observations from these first two workshops were used in revision of portions of the materials. Most of the revisions were made in the first session dealing with the issues of decisions and decision makers. Additionally,

attention was given to plans for the collection of better summative evaluation information than had been collected previously.

Four field test sites were arranged, three in California school districts and one in the Alaska State Department of Education. A total of 64 participants used all or parts of the materials. Approximately one-third were teachers and a little more than half were principals or other administrators; five were school counselors.

Thirty-nine of these participants responded to overall judgment questions at the conclusion of the workshop. Of these, eighty percent said that they had learned what they had expected from the workshop, ten percent said they had not gotten what they expected, and ten percent said they had mixed reactions. The participants were also asked what they would recommend to a friend if he sought advice about participating in a similar workshop. Eighty-five percent indicated that the unit was worth the investment of their own time. The results are presented in more detail.

Response	Number	Percent
Take on own time, with fee of $10	21	54
Take on own time, if no fee	12	31
Take on released time, if no fee	4	10
Do not take	2	5

In order to assess effects of the workshop, it was decided to construct a set of items that would appear to solicit opinions about evaluation procedures or values. The item content was chosen, however, by a detailed consideration of the purposes and content of each session in the unit; a five-choice "agree-disagree" statement was written if in the judgment of two of the developers an expectation of a particular response could be based on the unit content. Thus, while the items appear to assess opinions, they might be judged to have content validity as indicators of unit effects.

Approximately fifty such items were written, and four Laboratory Staff members, knowledgeable about evaluation, were asked to respond to them without knowledge of the content of the unit. Some items were edited, re-written or eliminated. Care was also taken to insure that the "correct" responses were about evenly divided between "agree" and "disagree." Two forms of the opinion questions were constructed, judged to be roughly parallel. These forms are included in the Appendix A, with the "correct" answers circled.

It seems likely that these two forms would yield good scales of opinion and might even yield a reasonably good Guttman scale. Lack of time and funds have, however, prevented any test of the scales. Scores were obtained on a scale from zero to 99. In three of the four sites, random halves of the participants were asked to complete Form A or B before the workshop and the alternate form after the workshop. Analysis of these data showed that the Forms A and B were equal in "difficulty" with means of 79 and 78 and standard deviations of 9.3 and 9.8.

The relationship between the pre- and post-opinion scales, pooling data from the two forms, for the 32 participants who provided usable data are shown in the table below. It should be noted that many more than these 32 completed the workshop. A number of the participants did not notice that the opinion questions were printed on two sides of the same sheet and so did not answer all items. In other instances, the participants' work schedules did not permit them to stay to provide the posttest data.

Table 1

Pre- and Post-Workshop Opinion Scores

Pre-Workshop Scores	Post-Workshop Scores: 66-73	74-81	82-89	90-99	Totals
90-99		1	1	3	5
82-89	1		2	4	7
74-81		1	2	4	7
66-73		1	4	5	10
58-65		1	2		3
Totals	1	4	11	16	32

Table 2

Statistics for Pre- and Post-Workshop Opinions

	Pre-Score	Post-Score	Post - Pre
Mean	78	89	11
Standard Deviation	9	6	11

It is evident from these data that, as a group, participants did alter their expressed opinions in the directions indicated by the content of the material. If the band indicated by the diagonal lines is used as indicative of no change in opinion, then one can conclude that 23 (72%) changed in a positive direction, three (9%) changed in a negative direction and six (19%) showed no change. The percentage of positive change seems quite marked when one considers the fact that the scores on the pretest were quite high before the workshop. The mean change is statistically significant.

In addition to information related to use of the unit that was collected by the staff, three other kinds of evaluation evidence are available: an unsolicited report from a field test; actions of the ACSA Professional

Development staff; and expert reviews of the second field test version.

Unsolicited field test report. The staff member from the University of Alaska who had handled the arrangements for the field test site in that state sent to the program an unsolicited report (Hecht). She had prepared five questions about the workshop that were of interest to her and she distributed the questions to the participants at the conclusion of the workshop. Responses were to be mailed; nine of the twelve participants responded. The individual responses are given in their entirety in the report which is included as Appendix B. The five questions and a classification of the responses is given here; the responses were classed as positive, neutral, negative or uncertain by the author of this report.

1. Do you feel you have learned anything in this workshop which will be useful in your area of responsibility? Explain.

   Eight of the responses were considered to be positive, without reservation; one was considered to be neutral or positive with some reservation.

2. What is your opinion of the materials presented at the workshop? a. content? b. format?

   Five responses were considered to be clearly positive, and four to be neutral or positive with reservations.

3. Do you see any use for these materials or similar in your job situations? Explain.

   Four responses were considered positive, two positive with reservation, two were judged to be negative, and one could not be classed. At least some of the reservations seem to be related to characteristics of the job situation rather than to the unit per se.

4. In your opinion, should AEPIC/CNER consider sponsoring similar workshops in the area of program evaluation? Briefly explain.

   Five responses appeared to be positive, three neutral or uncertain, and one negative. The responses seem to be directed to the general question of the value of workshops, and so only an indirect assessment of this particular workshop.

5. Please comment freely as to any additional reactions, suggestions etc. you may have...

   Five responses were interpreted as being quite positive about the workshop, and one as being positive but with reservations about future use. The others could not be judged, or related to matters other than this particular workshop.

Overall, the report seems to be quite positive about the materials and the workshop; but there seem to be some who have reservations or even negative feelings about the value of the materials to them or about using them in the future.

ACSA-Professional Development Program actions. After the ACSA-sponsored workshop in August, Dr. Edward Beaubier, Assistant Executive Secretary of ACSA, reported that a number of the participants spoke to him very positively about the workshop. They recommended that it be included as a regular part of the ACSA-PDP offering. In the fall, after the three district workshops had been completed, the liaison administrators for PDP did, in fact, vote to include it in their offerings. ACSA has now contracted with the Educational Services Division of the Laboratory to purchase materials and coordinator services to offer the workshop four times in different parts of the state.

Expert review of materials. After final revision of the unit materials, arrangements were made to have two specialists in evaluation review the materials and respond to questions posed by the program staff. The questions are included in Appendix C, but the reviewers were encouraged to offer any comments about the materials they thought in order.

The two reviewers were chosen to represent two quite different kinds of experience. They were:

Dr. David Payne
School of Education
The University of Georgia

Mr. Reginald Corder
Evaluation and Advisory Services
Educational Testing Service
Berkeley, California

Dr. Payne has frequently taught courses in curriculum evaluation, is the author of several books on measurement and evaluation and has served as a consultant on school evaluation efforts and on the development of competency-based administrator training. Mr. Corder has had extensive experience as a secondary school teacher and counselor and, for the last ten years, has been extensively involved in providing professional consultation to school planning and/or conducting evaluation projects.

Following are quotations from Dr. Payne's letter of transmittal sent with his report.

> "After studying the materials from cover to cover, I must conclude that they are the best I have seen....The package is far superior to the Worthen et al. simulations...and of course your materials are only a fraction of the Worthen costs. One index of my enthusiasm is my intense desire to use your materials this summer when I teach a course in curriculum evaluation...several colleagues of mine from one of our state Cooperative Education Service Agencies may be contacting you...about the possibility of securing the materials for use in a workshop in March."

Excerpts from Dr. Payne's responses to the questions posed by the program staff are presented below; the complete responses are given in Appendix C.

1. Adequacy and Responsiveness of Unit Goals and Objectives.

> "This reviewer definitely feels that the evaluation unit would be appropriate for principals and instructional supervisors, and to a lesser extent for teachers. The goals listed on pp. ix-x, and objectives identified on pages 1.3, 2.3, 3.3, 4.3, and 5.3 are definitely important ones, and if met and when applied could result in improved instructional programs. One wonders if objectives dealing with the mechanics of undertaking cost-effectiveness analyses have been slighted. The five steps identified in the evaluation process are logical and the ones usually stressed in such training programs."

2. Relation of Unit Activities to Goals and Objectives.

> "In general activities are highly responsive to the session objectives. One possible exception might be the degree to which Objective 2 on p. 2.3 and Objective 2 on p. 3.3 are treated adequately in their respective sessions.
>
> Obviously great care has been taken in the development of the materials. The directions for the coordinator are the most complete this reviewer has seen. The material on role playing and discussion-leading is most helpful. In addition the explicit and implicit emphasis on decision-making is to be commended."

3. Tasks of the Coordinator.

"Obviously some background in research, measurement, and evaluation, both academic and experiential, would be most helpful to a potential coordinator. In addition some human relation training would stand a coordinator in good stead."

4. Training Time Devoted to Unit and Sections.

"In general tasks seem relatively well balanced for time. This reviewer would be very hard pressed to eliminate any of the sessions. The notion, as suggested on p. xv of using a 12½ or 13½ hour schedules does not seem like a viable alternative. The saving of time is not that great, and yet considerable loss in training over important topics would probably result.

Despite the fact that they have been field tested this reviewer finds it difficult to accept the fact that Sessions 2 and 3 each really require three hours."

5. Cost of Materials

"There is no doubt that the projected pricing of the unit will be one of the strong points in it's appeal. Most other similar units, particularly those available from commercial sources, are priced three or four times the present price. Costs are well within the budgets of virtually all public schools and those of graduate students."

6. Use of Unit.

"This reviewer would have no reservations about using the unit either in a college or university teaching situation or in conducting workshops with public school personnel or professional organizations (assuming that they were relatively inexperienced in evaluation)."

"...the chief "competitor" with the Far West materials would probably be the simulation exercises developed by Blain Worthen. These materials run into several hundreds of dollars and are not nearly so detailed in presentation, particularly with regard to what participants and coordinator are to do, as are the Far West materials. The Far West materials are far superior with regard to objectives and specification of activities, responsibilities, and roles of both participants and coordinator."

Excerpts from Mr. Corder's report, which was in the form of a letter are quoted below. The entire letter is included in Appendix C, except for the initial and final paragraphs, which are not related to this unit.

"I was pleased to see a training package directed to program improvement, and to an audience at the building level...More and more I have come to believe that for program improvement and actual use of evaluation data those persons actually engaged in

the program should have major responsibility for planning and conducting the evaluation..."

"I would like to use the materials in a situation where building staff wish to evaluate a new program...most small projects, at least, and building level projects think of the evaluation too late, not at the time of program development. I would be highly receptive to a call from a superintendent which went, 'Come and help us plan for the evaluation of a program which we expect to get under way next fall (or spring or whatever).' The opportunity to use your materials under these circumstances, to get program staff involved in the elements of planning for program improvement, and then later engaged in working on the evaluation of their real program would be attractive to me. I am most hopeful for the materials under these circumstances. While such circumstances are ideal, I also think that the materials would be successful in a less ideal s situation where I would say, 'Okay, I'll come and put together an evaluation which will save your project funding now, but as the next step you must provide staff time for a workshop in which they will learn something about planning their own evaluation.' ...Even under forced conditions, however, the materials are presented in simulations which could engage the interest of a building level audience."

Conclusions

The information that has been obtained about this unit indicates that it is effective as material for training. It is generally seen as useful by those who have used the material, and meets a need that is seen as important by both school personnel and non-school specialists. The major unanswered questions are: the extent to which the unit is dependent on the personality, qualifications, and evaluation philosophy of the coordinator; the amount of preparation required by coordinators who may vary greatly in the qualifications; and the variations from one situation to another in the usefulness of the role playing. In one instance, the need to assume a particular role in front of colleagues in a district appeared to create a conflict and perhaps even a personal problem for one participant.

While it would undoubtedly be good to devote additional effort to getting more information about the use of the unit, funds are not available for such

an undertaking. On balance, the available information seems to justify making the unit in its present ~~form~~ available for use in schools and universities.

The unit has been reproduced in limited quantity, and is available for sale through the Laboratory. The Participant's Handbook is priced at $7.95; the Coordinator's Handbook, transparencies, and filmstrip and cassette tape cost $34.95.

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_____ "Evaluation Resources Unit: Staff planning paper for preliminary form development" San Francisco, Ca.: Far West Laboratory for Educational Research and Development, June 1973.

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Far West Laboratory for Educational Research and Development "Contractor's request for continued funding" Berkeley, Ca.: September 1969.

_____ "Contractor's request for 1971 funding" Berkeley, Ca.: September 1970.

_____ "Annual 1972 budget justification" Berkeley, Ca.: September 1971.

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Harris, W.A. "Concept paper for training package on Planning for Evaluation of Instructional Programs" Staff paper, August 1971.

_____ "Review of task 33: training package - Planning for Instructional Program Evaluation" Staff memorandum, October 1971.

Hecht, K.A. "Report on AEPIC/CNER sponsored evaluation workshop" Staff report, Center for Northern Educational Research, University of Alaska, November 1974.

APPENDIX A

Date: _____ Name: _____

OPINION QUESTIONNAIRE
(Form A)

Indicate whether you agree or disagree with the following statements by circling one of the numbers from one (strongly disagree) to five (strongly agree). Example: "Charlie Brown is a good baseball manager." 1 (2) 3 4 5

	disagree			agree
1. Evaluation should be performed only when a program is completely developed.	(1) 2	3	4	5
2. Evaluation studies should determine the correct decisions about how to change or improve a program.	(1) 2	3	4	5
3. The real test of an evaluation is whether it helps someone make a better decision on how to improve a program.	1 2	3	(4)	5
4. Evaluation should not be done by people who are on the school district staff.	(1) 2	3	4	5
5. Evaluation is not a very common human activity.	(1) 2	3	4	5
6. The first step in planning for evaluation is to identify the possible decisions on how to improve the program.	1 2	3	(4)	5
7. "Terminate the program," is a good example of the kind of decision which could be listed as possible at the beginning of an evaluation study.	1 2	3	(4)	5
8. Evaluation information will be most useful if it is related to particular decisions and decision makers.	1 2	3	(4)	5
9. Time and money are likely to be wasted if possible alternative actions or improvements in the program are specified in advance.	(1) 2	3	4	5
10. All feasible alternatives should be considered before making a decision.	1 2	3	(4)	5
11. If alternatives are not specified in advance, information necessary for making the decision may not be collected.	1 2	3	(4)	5
12. The values, ideals, and constraints affecting decisions are among the less important factors to consider in planning and conducting an evaluation.	(1) 2	3	4	5

Opinion Questionnaire
Form A, p. 2

Name: _____

	disagree				agree
13. Instruments should not be chosen until information needs and probable sources have been identified.	1	2	3	(4)	5
14. Methods to be used in analyzing the information that will be collected in an evaluation study do not need to be outlined until after data are collected.	(1)	(2)	3	4	5
15. Information needs can be identified by matching program characteristics with the considerations important to the decision maker(s).	1	2	3	(4)	5
16. When planning information collection, it is important to consider whether enough subjects are available to justify the cost of collecting and analyzing particular kinds of data.	1	2	3	(4)	5
17. Community publications are often a good source of information for use in formulating questions for program evaluation.	1	2	3	(4)	5
18. Standardized tests are a complete source of information on a program.	(1)	(2)	3	4	5
19. Even in a well-run evaluation, consultant help or data processing services may be necessary.	1	2	3	(4)	5
20. The interests and requirements of the decision maker must be a prime consideration in how the evaluation report is put together.	1	2	3	(4)	5
21. Simplicity is irrelevant in data display.	(1)	(2)	3	4	5
22. The evaluator should plan how to obtain evidence about the relevance and reliability of data to be collected in an evaluation study.	1	2	3	(4)	5

NOTE: Circled responses represent "correct" answers as determined from unit content.

Scores represent the total of item values, obtained as follows:

Response	Response Value
"Correct"	4.5
Neutral	2.0
"Incorrect"	0.0

Date: _____ Name: _____

OPINION QUESTIONNAIRE
(Form B)

Indicate whether you agree or disagree with the following statements by circling one of the numbers from one (strongly disagree) to five (strongly agree).

	disagree				agree
Example: "Snoopy should get the Red Baron."	1	2	3	4	(5)
1. Evaluation should be performed while the program is being developed.	1	2	3	(4	5)
2. Evaluation studies should be used in deciding whether to retain or drop part of the curriculum.	1	2	3	(4	5)
3. Teachers should have a major role in planning and conducting evaluation studies.	1	2	3	(4	5)
4. Evaluation is a common human activity.	1	2	3	(4	5)
5. The real test of an evaluation study is whether or not the evaluator is satisfied that he knows how good the program is.	(1	2)	3	4	5
6. In planning for evaluation activities, it is not important to distinguish information gathering decisions from program modification decisions.	(1	2)	3	4	5
7. "Change the goals and objectives," is a good example of the kind of decisions which could be identified at the beginning of evaluation planning.	1	2	3	(4	5)
8. It is comparatively unimportant to know who has the authority to make decisions about program modification.	(1	2)	3	4	5
9. Specifying potential alternative improvements in advance helps one focus evaluation activities efficiently.	1	2	3	(4	5)
10. All feasible alternatives should be considered before making a decision.	1	2	3	(4	5)
11. Possible decisions and alternatives cannot be identified until the evaluator has specified necessary information.	(1	2)	3	4	5
12. Program costs, academic effectiveness, and student attitudes are usually relevant considerations in deciding how to modify a program.	1	2	3	(4	5)

	disagree				agree
13. Instruments should not be chosen until information needs and probable sources of information have been identified.	1	2	3	(4)	(5)
14. If information analysis is planned ahead, information may be collected in an inconvenient form.	(1)	(2)	3	4	5
15. Information needs can be identifed by matching program characteristics with the considerations important to the decision maker(s).	1	2	3	(4)	(5)
16. It is essential to schedule data collection activities and personnel assignments before implementing the evaluation plan.	1	2	3	(4)	(5)
17. Information about students can be gotten only from them.	(1)	(2)	3	4	5
18. Evaluators should develop all their own instruments.	(1)	(2)	3	4	5
19. A well-trained evaluator should be able to handle all aspects of data collection and processing.	(1)	(2)	3	4	5
20. Comprehensibility is a prime consideration in data display.	1	2	3	(4)	(5)
21. In order to be useful at all, evaluation recommendations must be written with specific decision makers in mind.	(1)	(2)	3	4	5
22. The evaluator should plan how to obtain evidence about the relevance and reliability of data to be collected in an evaluation study.	1	2	3	(4)	(5)

NOTE: Circled responses represent "correct" answers as determined from unit content.

Scores represent the total of item values, obtained as follows:

Response	Response Value
"Correct"	4.5
Neutral	2.0
"Incorrect"	0.0

APPENDIX B

Report on

AEPIC/CNER Sponsored

Evaluation Workshop

October 14-16, 1974

Kathryn A. Hecht
AEPIC Evaluator
Center for Northern Educational Research
University of Alaska

November 25, 1974

On October 14-16, at the Holiday Inn in Anchorage, AEPIC/CNER coordinated an evaluation workshop for twelve participants from a variety of Alaskan educational institutions (see list of participants attached).

The materials used during the workshop were supplied by the Far West Laboratory for Educational Research and Development. This workshop is entitled "Evaluation for Program Improvement" from a training series called "Designing Instructional Programs". The workshop leader, Dr. Earl Mortensen of the Lab, was one of the developers of these training materials.

As evaluator for AEPIC and workshop coordinator, I decided to let the participants speak for themselves on the value of this and other such activities in terms of their professional need, as they are certainly in the best position to judge. Their answers to my questions are reported fully in the following pages. The questions were discussed during a brief introductory talk the first day of the workshop and passed out at its completion, to be returned by mail. Nine of the 12 participants responded, as of November 22.

It should be noted that except for one day for sickness, each person attended all three days.

Also, two of the participants were from non-school settings. Their comments reflect the fact that these materials are directed toward a narrowly defined audience. They were told ahead of time that the material was very school related, but chose to participate anyway. Perhaps this decision reflects the urgent need felt for evaluation training and the lack of such training readily available in Alaska.

From my limited observation of the workshop, I would like to add the following comments to those of the participants:

1. Twelve people was a very workable number.

2. The role-playing technique used during most of the workshop created good interaction. It seemed to put people at ease. Perhaps people are less afraid to speak up when they are playing a role.

3. Three days of attendance is not too much to expect of busy people if they feel a need and wish to participate, and if there interest can be held.

PARTICIPANTS RESPONSES

1. Do you feel you have learned anything in this workshop which will be useful in your area of responsibility? Explain.

This workshop was pertinent for me as Assistant Superintendent of the Nome Schools with responsibility for development, implementation and evaluation of specially funded programs. I have had the problem of having to do too much of the proposal development and evaluation without the involvement of the teaching staff. Traditionally, the teaching staff has not been involved to any great extent in such efforts. By their own admission, many teachers feel inept in the area of program evaluation.

I think the workshop will cause me:

- To encourage more teacher involvement in evaluation.
- To spend time with individuals and groups explaining evaluation and the process for developing an education evaluation plan.
- To make evaluation an integral component of program planning and development.
- To make me aware of the importance of group dynamics in the evaluation process.

Definitely! As a present school board member I spend considerable time reviewing program evaluations of our own school district as well as others. Clearly the seminar has given me expanded perspective of the process and product of the evaluation of programs.

Although I felt that I had gone through this type of workshop before, there was a definite value in actually working up the kinds of materials and to participate in the divisions inherent in the workshop format.

Yes, I learned something useful from the workshop. The major steps of evaluation for program improvement resembled greatly but was superior to my own structure. The Alternatives/Considerations matrix and other methods of presenting data were also useful.

Yes - As coordinator for the minority group activity program, I feel that the workshop provided me with facts concerning how important it is to have an evaluation program within a school district, such as, who should be involved, the cost, and all the important factors and tasks compiled together which can make or break an evaluation program.

Yes. Helped to refocus my thinking re program evaluation. Also, if package becomes available, could use with our staff.

I. Cont'd.

Yes, I am responsible for programs in elementary classrooms, and I need to have a way to obtain information about these programs that does not come in bits and pieces.

Yes, I feel I have learned some things from the workshop: such as measuring a program and how to touch on both negative and positive aspects of a program, also information on sources in the community to resort to for reactions from the people.

Somewhat: It's given me a framework/references for overall program evaluation.

---

2. What is your opinion of the materials presented at the workshop? a. content? b. format?

The content of the materials presented at the workshop were generally good. The materials did not reflect the Alaskan scene as might be desirable for a statewide presentation. Such materials developed around an Alaskan school might be a good idea.

The format was good. I liked the idea of using an actual school as a model. The program may be a little too long to present as in-service for the average busy school in Alaska.

The effective background for simulation activity and reveal vividly the dynamics of real-life evaluation projects. The content is quite good, and I believe the format is effective. One possible change might be to provide the individual role descriptions on separate cards to avoid our overviewing other roles to the extent that we inhibit that "player's" activity.

Materials were excellent in that they represented a hypothetical and a practical situation. The content was excellent and the format required step-by-step progress.

The annotated bibliographies were useful and the additional bibliography was outstanding. Some negative impressions on the format were explained in the previous letter. I would have appreciated a one-page agenda or syllabus.

Since this was my first time attending such a workshop, I don't feel I am completely qualified to elaborate on paragraph 2 of your questionnaire. I do feel that the material presented was excellent. From listening to others in the workshop, the content could have been based on actuality rather than simulation. The format is fine.

Both good.

The content was clear and communicated at my level of interest and thinking about evaluation.

---

2. Cont'd

I thought the material given to us for the amount of time spent on this subject was adequate, because if we got into any more, or more difficult, I would have been confused because of the lack of time spent on it.

Much of the content was too educational program-specific for my needs. The format, especially the simulation exercises, was strong. Would help if all participants had more or less the same exposure to subject matter.

---

3. Do you see any use for these materials or similar in your job situation? Explain.

Similar materials will be used as I work directly with the teaching staff. The entire program would be hard to schedule for Nome. It might be acceptable to a sizeable group if it is offered by the University of Alaska over a period of time for credit. If it could be offered as a credit course and meet one evening a week for five weeks, I suspect ten to fifteen local people will enroll.

If I do move into educational administration as I am presently considering, I'm confident that there will be numerous uses for similar materials. Simulation and related activities are rarely unsuccessful in stimulating learning, and I would seek such materials for any instructional projects for which I was responsible.

I definitely see use for these types of materials in our situation in Anchorage and talked with the group leader as to the possibility of obtaining copies or permission to use similar items.

I have explained previously that much of the content can be adapted for evaluation training workshops for a continued Mini-Grants program or for the ANCADA Training Program. The format will have to be altered to suit the target population, however.

I'm sure this material will be helpful to me as a guide for future use. It has the necessary instruments that will assist me in determining how to go about putting an evaluation team together within my own structure once I have personnel.

Yes. Work with professional staff in program evaluation.

Consultants involved in planning programs should be aware of ways they can be evaluated.

The only way I can see me using this material in my job situation would be comparing the content with another program that I'm working on.

Not really.

---

4. In your opinion, should AEPIC/CNER consider sponsoring similar workshops in the area of program evaluation? Briefly explain.

Yes. There is not enough understanding of evaluation among the ranks of the average Alaska school district and additional workshops could help. . .

Yes, I believe AEPIC/CNER could provide a real service - especially to small districts in Alaska - by sponsoring similar workshops in the area of program evaluation. Consumers seem to be asking for more evaluation, and I feel certain that we are entering an era of greater emphasis on this field.

It would appear to me that there are definite advantages in having an agency or institution set up these types of workshops. Then there is no question as to the reasons for holding them. That is, people sometimes question the motive of a single district or state agency. I do not feel that the University would be so questioned.

I'm really unable to offer any advise on this question. I gained from the workshop, but I know that this program is not one that you're required to service.

I believe workshops such as this one would be beneficial in this area. It should be made available to administrators, teachers and other concern groups. Our evaluation program needs strengthening, and this is one way to do that.

Yes. Larger districts could undertake this on their own, however.

Yes. Either at the next step for this group or as an introductory session like this one for a new group. Would personally like the "next step".

Yes, I think a program evaluation workshop should take place so we can cover the evaluation of many types of programs.

Yes, I'd like to see a workshop designed around a more general approach to program evaluation (less secondary, urban education context).

---

5. Please comment freely as to any additional reactions, suggestions etc. you may have. . .

Dr. Earl Mortensen was an excellent leader. I question if the materials could be presented accurately by someone not as knowledgable regarding the program as was Dr. Mortensen. He indicated that with some in-service training, almost anyone could conduct the program using the prepared materials, but I think screening of the candidate for leader would be essential.

If the content of the workshop were condensed to a two-day schedule, including an evening, some districts might release employees for it more readily.

I think the above represents my feelings and would add no more.

Perhaps an "instant replay" of some of the simulation activities would be useful in stimulating more serious participation.

As Del Johnson and Lou Gonzales would have it, lets summarize the program and assign tasks.

I enjoyed the workshop and the personnel involved. Inner changing of ideas are very useful you know.

Good workshop. Enjoyable, meaningful and helpful.

Excellent - I would have profited by concluding statements from the moderator, even though it was contained in the written material I respond best to "live" input.

I feel that just about any evaluation workshop is worthwhile being that it is organized properly.

More on how to define what is measurable (goals and objectives), how to measure them (models) - I really wanted something more general, which would readily apply to a variety of programs (this might not fall into the realm of AEPIC/CNER but I think it should!).

LIST OF PARTICIPANTS

Evaluation Workshop: Evaluation for Program Improvement
October 14-16, Holiday Inn, Anchorage

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Mr. Darold Hargraves

APPENDIX C

Questions for Expert Reviewers of

Evaluation for Program Improvement

In your review and report, you are encouraged to respond to the kinds of questions you might ordinarily ask in review of training materials being considered for use by you in your school setting, or in a training session you might be conducting for others. We are seeking your judgments about the unit, made in a way that you think is most realistic and meaningful to you as a user based on your own past experience with similar kinds of materials. However, listed below are the questions to which we would like you to respond:

1. Do the goals and objectives as stated in the unit, or as inferred by you from the content, address an important need for school staff, which if met would result in improving the effectiveness with which school staff perform in their jobs?

2. Recognizing that there will be some relative minor revisions made before the unit is released, does the unit in its present form and content seem to be well directed to the stated goals and objectives?

3. Is there additional information or materials that you believe would simplify or improve the work that the unit Coordinator would have to do? Are there situations or kinds of Coordinators for which you might predict the unit would not work, and if so, can you describes the limits on its use? (We know that the unit can be used effectively by non-Laboratory Coordinators, because it has been done. What we don't know, and have neither time nor money to determine, are the limits on effective use of the unit.)

4. If the unit were to be used, but the staff could not devote the full fifteen hours judged to be necessary, what would be your recommendations for sections to be eliminated, stated approximately in priority order? (What could be eliminated first, what second, and so on.)

5. Do you believe that this unit would be used in school staff training if it were available at a cost of $8.00 per participant, plus a charge of $35.00 for Coordinator's materials?

6. If a school district sought your recommendation as a paid consultant for a staff training program, and you were satisfied that staff was clear on what they wanted to accomplish in a new program, would you recommend use of this unit? What other training procedures and materials might you consider as alternatives to this one? How would you rank this unit relative to these other materials?

RESPONSES TO SPECIFIC QUESTIONS REGARDING TRAINING MATERIALS FOR EVALUATORS PRODUCED BY FAR WEST LABORATORY FOR EDUCATIONAL RESEARCH AND DEVELOPMENT

DAVID A. PAYNE

1. Adequacy and Responsiveness of Unit Goals and Objectives.

It is difficult to identify which individual(s) in a school setting would have the major responsibility for undertaking program evaluations. In larger systems there maybe an "official" evaluator or office of research. For personnel in these kinds of positions, or rather the second line personnel, the unit maybe appropriate. This reviewer definitely feels that the evaluation unit would be appropriate for principals and instructional supervisors, and to a lesser extent for teachers.

The goals listed on pp. ix-x, and objectives identified on pages 1.3, 2.3, 3.3, 4.3, and 5.3 are definitely important ones, and if met and when applied could result in improved instructional programs. One wonders if objectives dealing with the mechanics of undertaking cost-effectiveness analyses have been slighted.

The five steps identified in the evaluation process are logical and the ones usually stressed in such training programs.

2. Relation of Unit Activities to Goals and Objectives.

In general activities are highly responsive to the session objectives. One possible exception might be the degree to which Objective 2 on p. 2.3 and Objective 2 on p. 3.3 are treated adequately in their respective sessions.

Obviously great care has been taken in the development of the materials. The directions for the coordinator are the most complete this reviewer has seen. The material on role playing and discussion-leading is most helpful. In addition the explicit and implicit emphasis on decision-making is to be commended.

3. Tasks of the Coordinator

Obviously some background in research, measurement, and evaluation, both academic and experiential, would be most helpful to a potential coordinator. In addition some human relation training would stand a coordinator in good stead.

(In addition see attached Supplementary Resources List)

4. Training Time Devoted to Unit and Sections

In general tasks seem relatively well balanced for time. This reviewer would be very hard pressed to eliminate any of the sessions. The notion, as suggested on p. xv of using a 12½ or 13½ hour schedules does not seem like a viable alternative. The saving of time is not that great, and yet considerable loss in training over important topics would probably result.

Despite the fact that they have been field tested this reviewer finds it difficult to accept the fact that Sessions 2 and 3 each really require three hours.

5. Cost of Materials.

There is no doubt that the projected pricing of the unit will be one of the strong points in it's appeal. Most other similar units, particularly those available from commercial sources, are priced three or four times the present price. Costs are well within the budgets of virtually all public schools and those of graduate students.

6. Use of Unit

This reviewer would have no reservations about using the unit either in a college or university teaching situation or in conducting workshops with public school personnel or professional organizations (assuming that they were relatively inexperienced in evaluation).

A list of additional resource materials that might be used by the coordinator to gain background information is enclosed.

At this point in time the chief "competitor" with the Far West materials would probably be the simulation exercises developed by Blain Worthen of the Northwest Regional Educational Laboratory and others, and published by Charles Jones Publishing Company of Worthington, Ohio. These materials run into several hundreds of dollars and are not nearly so detailed in presentation, particularly with regard what participants and coordinator are to do, as are the Far West materials. The Far West materials are far superior with regard to objectives and specification of activities, responsibilities, and roles of both participants and coordinator.

7. Miscellaneous Observations

(a) It is not clear in the Introduction that the Annotated Readings are for the Coordinator and not the participants.

(b) The Prologue will probably not receive an Oscar.

(c) Is giving the participants a choice of roles to play a reasonable approach? It is obvious that some will be disappointed. Why not just allow the coordinator to assign roles to individuals on the basis of his knowledge of their backgrounds?

(d) Excellent summary of data collection methods pp. 3.33-3.37.

(e) The suggested reading in Stufflebeam et.al. of Chapter 4 is perhaps ill-advised due to complexity and high degree of abstractness. It will not win a Pulitzer Prize for Literature.

(f) At times it is difficult to follow transitions from coordinator activities or materials to participants activities and materials, e.g from p.1.24 to 1.25.

(g) The scoring guidelines for the wrap-up activity of pp. 5.28-5.42 are most helpful.

(h) One wonders if it would be possible to provide participants real practice in summarizing, analyzing, reporting, and writing recommendations from hypothetical data. This kind of activity could perhaps be included between the Fourth and Fifth session.

(i) Dr. Hartman will really have to be on his or her toes during the Fifth session due to the magnitude and complexity of the exercise. Coordinator needs to work very closely with this person prior to session.

(j) Providing participants with a hypothetical budget, or having them generate one would add greatly to the realism of the unit. Particularly when the budget reduction is imposed. A percent reduction would have to be specified.

(k) Would it be possible to generate a time matrix like that on page 1.3 for all the exercises and sessions so that the coordinator could better plan for time?

(l) It is difficult to really get a handle on what "considerations" are in Session 3. Are we really not talking about dependent variable classifications? I would not use the term dependent variable, but would consider the concept. The intersection of source and variable classification categories could still be used to specify instrumentation.

(m) Could not some of the participants in-session reading be accomplished prior to meetings thereby allowing for shorter sessions? The material in the participants handbook on pages 96-98 might profitably be read, for example, prior to Session 3.