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ABSTRACT

Correspondence, survey, and group interview data were combined to investigate the nature and consequences of participatory evaluation activities in a medium-sized school district (48,000 students) in Simcoe County in Ontario (Canada). The study focused on the dynamics, supporting conditions, and consequences of internally conducted participatory evaluation. Data were collected from staff who participated in several evaluation studies, including evaluations of student guidance services, library services, intermediate mathematics, intermediate history and contemporary studies, and French as a second language. In each case, the author, as the sole district staff member in a research capacity, provided technical support for problem formation, instrument development, data processing, analysis and interpretation, development of suggested courses of action, and assistance in report writing. Results inform the researchers' understanding of the conditions supporting effective internal participatory evaluation. (Author/SLD)

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***A PARTICIPATORY APPROACH TO DISTRICT-LEVEL PROGRAM  
EVALUATION: THE DYNAMICS OF INTERNAL EVALUATION***

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*Paper presented at the annual meeting of the American Educational Research Association, Atlanta, Georgia, April, 1993, in the Division H Symposium: Studies in Participatory Evaluation.*

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### ***Abstract***

*This study combined written correspondence, survey and group interview data to investigate the nature and consequences of participatory evaluation activities in a medium-sized school district (48 000 students). The author is the sole district staff person in a research capacity and necessarily works closely on program evaluation projects with school and district office-based personnel. The study focused on the dynamics, supporting conditions and consequences of internally conducted participatory evaluation. Data were collected from staff who participated in several evaluation studies including evaluations of guidance (student) services, library services, intermediate mathematics, intermediate history and contemporary studies, and French as a Second Language. In each case, technical support was provided by the author for problem formulation, instrument development, data processing, analysis and interpretation, the development of suggested courses of action based on the findings and assistance in report writing. The results inform our understanding of the conditions supporting effective internal participatory evaluation.*

# **A PARTICIPATORY APPROACH TO DISTRICT-LEVEL PROGRAM EVALUATION: THE DYNAMICS OF INTERNAL EVALUATION**

## ***Background and Introduction***

*For the past several years I have been the sole educational researcher for a medium-sized school district in one of the largest counties in the province of Ontario, containing approximately 4 800 square kilometres of territory. The school district currently has approximately 48 000 students and 3 100 teaching staff in 82 elementary and 15 secondary schools. The 1992 expenditure budget was \$290 300 000.*

*During the 1980s a major program focus for all school systems in Ontario involved the implementation of provincial curriculum guidelines. The ensuing review, development and implementation cycle (Leithwood, 1987) resulted in a more visible role for program evaluation.*

*Consequently, a model for conducting program evaluation was developed to guide internal evaluation activities in this school district (Lafleur, 1990). Evaluation is viewed as having an accountability component and a formative component that inform decision making. One feature of the program evaluation model is to engage primary users in as many phases of the evaluation process as possible. For example, all internal evaluations rely on an evaluation team that involves members in the "nuts and bolts" of the problem formulation, instrument design or selection, data collection, analysis, interpretation and reporting. Members of this team typically include primary users such as senior administrators, program support staff, school administrators, teachers and the school district researcher. In addition, a variety of primary users are often involved in specific phases of the evaluation process such as data collection, analysis and interpretation of the findings.*

*The current focus on educational change (Fullan, 1991), school improvement (Stoll and Fink, 1992) and restructuring (Murphy, 1991), as well as the continuing public concern for accountability, ensures a continued role for program evaluation in this school district. In the current economic climate, it is increasingly obvious that expectations will continue in a context of very limited resources. Internal evaluation such as that described by Love (1991) and Mayne (1992) emphasizes working within the organizational context but also highlights the organization's responsibility. Consequently, the present research study provides data for critically reflecting on existing program evaluation in this school district.*

*This research study acknowledges the substantial review of the literature that was recently completed by Cousins and Earl (1992). In fact the design of the present research study uses many of their ideas and deliberately operationalizes a number of their key concepts.*

*The emphasis given by Cousins and Earl to organizational learning seems to make a great deal of sense in the current context of educational change and restructuring. Bolman and Deal (1991) and Schein (1991), for example, have provided extensive documentation that helps us examine and consider some of the issues related to organizational cultures. It seems reasonable, for example, to conclude that the way organizations do business influences the form and impact of program evaluation.*

*The power relations and existing structures are the practical everyday realities that may or may not match the stated beliefs and values of the organization. It may be critical, as Shavelson (1988) suggests, to try and understand the mind frames of policymakers and practitioners. By understanding better the perceptions and demands on policymakers the likelihood of improving evaluation and the utilization of findings may be increased.*

*Greene (1992) also focuses on the relation between participatory evaluation and the organization. She suggests, however, that "the more difficult challenge ... is just how a collaborative inquiry process can catalyze and develop the structural capacity to act." (p.7) Weiss' views that evaluation is a political act and that decision making is not always a rational enterprise also challenge evaluators to critically consider how they can best assist individuals in participating more wisely (1992, 1988).*

*A case study by Pugh (1990) illustrates the difficulties of evaluation utilization. In spite of doing quality work, Pugh believes that "... significant findings and/or policy implications are not acted upon due to the combination of economic considerations, political realities and public relations impact".*

*Cousins and Earl (1992) have provided an excellent synthesis of the literature on participatory evaluation and evaluation utilization. Their work occurs at a critical time in the evolution of the evaluation enterprise. It acknowledges the increasing democratization of evaluation by respecting the role and responsibility of the individual and the organization. In addition, evaluation is growing up in an environment that is more tolerant, accepting and even demanding of methodological diversity. As we deal with new and emerging educational paradigms, the challenges to the evaluation enterprise will continue.*

### *Method*

*The present research study was designed as a retrospective examination of this school district's approach to program evaluation. In particular the study set out to examine the relation between the participatory nature of the evaluation process and the utilization of the findings. It was also designed to provide information about how well the current model for internal program evaluation is being implemented in a medium-sized school district where the author is the sole person*

*employed in a research capacity. In addition, information was required about the strengths and weaknesses of current evaluation practices and needed changes.*

*This research study collected data on the perspectives of primary users who were involved in a number of internal evaluations that were completed over the past several years. The actual research activities, including the development of instruments, administration and collection of data, the analysis of data, the interpretation of findings and the writing of the report were coordinated and undertaken by the author.*

*In order to obtain the most reliable and valid information related to the impact of the participatory evaluation approach, complementary research approaches were used. Initially data were obtained from written correspondence initiated by the author with seven primary users who had participated in previous school district evaluations. Questionnaires were then used to collect further information from a wider range of primary users about their involvement in previous school district evaluations. Finally, a focused group discussion was undertaken with the original cadre of primary users who had participated in the previous two data collection methods. For the purposes of this study the total number of primary users represented about one-third of those who had previously participated as members of the different internal program evaluation teams over the past several years.*

*The remaining part of the method section describes the techniques associated with each of the different approaches that were used in the study.*

#### *Method 1: Written Correspondence*

*The intent of the written correspondence was to gather initial information and at the same time involve a small cadre of individuals in the present retroactive research study. This method was chosen as an unobtrusive way of encouraging*

*a small select group of individuals to reflect on their involvement in previous program evaluations and to reconstruct their own version of significant features of their participation.*

*Although eight persons were initially approached and agreed to participate, other commitments precluded one person from participating in the written correspondence phase of the study. Consequently, the author corresponded with seven individuals. In two instances one written exchange occurred. In the remaining five cases two letters were passed back and forth.*

*Following a period of about six weeks the written correspondence phase of the study was concluded. Replies were then analyzed for emerging themes and issues.*

#### *Method 2: Questionnaires*

*The use of questionnaires is one way of collecting data from a large number of individuals in a relatively short time span. In this research study, questionnaires were used to focus on the perceptions of a selected group of primary users who had been involved in previous program evaluations. Every third person on a master list of all individuals who had been members of previous internal evaluation teams, including those who participated in the written correspondence phase of this study, were asked to complete a questionnaire. The group was selected to represent nine internal evaluations that had been completed in the school district within the last eight years. The focus of these evaluations included technical education, behaviour, grade 4-6 mathematics, French-as-a-second language, special education identification and placement, guidance (student) services, library services, grade 7-10 mathematics, and grade 7-10 history and contemporary studies.*

*The questionnaire items were directly related to the participatory approach to evaluation and the utilization of the findings. The recently published article by*



*Cousins and Earl (1992) was particularly instrumental in informing the design of the questionnaire. For example, there was a series of questions dealing with the quality of the evaluation and factors affecting utilization. In addition, there were questions containing a number of Likert items dealing with the views of primary users on the participatory evaluation process, their own involvement in the evaluation activities, and the organizational culture of the school district relative to evaluation.*

*The questionnaires were developed and responses analyzed by the school district researcher. Twenty-eight individuals were given questionnaires to complete. Although 27 completed returns were eventually received, only 24 responses were available when the preliminary analyses were undertaken.*

*Descriptive statistics and comments were compiled for all questions. Correlation matrices were then calculated for most items in the questionnaire. In addition, factor analyses were completed for items contained in three questions -the review process, primary user involvement and organizational culture. Finally, regression analysis was used to examine the relations among a few key factors that had been identified in the literature, the written correspondence, descriptive analyses of questionnaire responses and during focused group discussion.*

### *Method 3: Focused Group Discussion*

*Within two weeks of the questionnaires being distributed, the original group of eight persons who had agreed to participate in the written correspondence were invited to participate in a focused group discussion. All eight individuals spent approximately 90 minutes sharing their ideas about the value and effect of internal program evaluation. Field notes were taken and summaries made of key ideas and suggestions.*

## ***Findings***

*The findings are presented under three headings, each corresponding to the approaches described in the method section. No attempt has been made to provide an exhaustive analysis of the results at this time. Rather the initial findings and preliminary analyses are highlighted.*

### ***Findings 1: Written Correspondence***

*The written correspondence provided a unique opportunity for several primary users to reflect upon their involvement in previous evaluations. For some, this meant revisiting activities that happened up to eight years ago. Others were more fortunate in that their involvement occurred within the last few years.*

*Each person identified their experience as a positive and worthwhile one. All indicated that they had learned more about the inquiry process and the program in question. On the other hand, most were guarded in their assessment about the actual impact of the evaluation, indicating limited success in the development and implementation of the resulting action plan.*

*In order to provide a primary user perspective, a number of extracts from the letters are included here. Many of the issues mentioned in the literature, as discussed by Cousins and Earl (1992), are represented in the following comments.*

*"Since the beginning, the researcher has been closely connected to program personnel. Initially this occurred formally; when the researcher had coordinating responsibilities for some subject areas ... Also the researcher met regularly with other program department members ... As such research has never been outside program. Rather it has been integral to it. For example, the Document Implementation Plan which guides our system has program evaluation as part of the process ...."*

*"An evaluation steering committee was struck to oversee this project. Although the researcher did not chair the committee, the membership looked to him for leadership and direction .... Throughout the project the researcher laid out the blueprint ... leading us through the process .... In summary, the term collaborative effort might be used to describe the relationship."*

*"Whether or not it was the nature of the (second evaluation) project ... there was less direct involvement by the researcher. In spite of the more "arms length" approach by the researcher this should not be interpreted as a less valued contribution. The researcher was a valued consultant to the planning committee .... the relationship between myself and the researcher was different .... The difference would be in the roles and responsibilities .... I feel that the "training" I received in the (first*

*evaluation) project allowed me, consciously or otherwise, to rely less heavily on the researcher."*

*"I think that our problem is that evaluations are foreign to us. Teaching has largely been a very private endeavour between teacher and student. There has been little monitoring, supervision and dialogue even within the same school."*

*"Much of the time in the beginning stages was spent formulating the criteria/questions for the evaluation .... After each meeting our work would be scrutinized by the Superintendent of Program. Areas that were deemed by him as not applicable to the evaluation were dropped. Other than that the evaluation team set its own goals for the evaluation."*

*"As we continued into the next phase of our task it seemed to me that we were working cohesively .... We would bring to each committee meeting our ideas and share them with the group. Ideas were accepted, challenged or modified in a very open manner .... using consensus the group would agree, approve, revise ...."*

*"As a committee we were very proud of the work we had done, the interest we had generated and the suggested courses of action that we had*

*developed. (What happened next) was to be our biggest disappointment of the whole process .... Delay after delay ensued .... No indication as to where our report would go was given to us .... Letters by various members of the committee inquiring into the status of the evaluation or release of the evaluation to the system were not answered."*

*"In both evaluations, for different reasons, the system did not take much action to put in specific items from the evaluation. The two evaluations were started for purposes that did not fit the realities of political commitment. Generally speaking, the evaluations had a fairly large agenda to "sharpen up" some aspects of the system. Additional, but minor, agenda items were to gather information and to give future direction...."*

*"One of the major strengths was the gathering of a variety of data in diverse ways. The information diversity gave the impression (an accurate one) that this was a very thorough evaluation covering a wide range of areas and leading to a workable action plan. The mix of people on the committee ... and the fact that the committee was chaired by a secondary school principal, gave a high degree of credibility to the group and led to strong feelings of team membership. The fact that we also had a high degree of credibility at the provincial level was a positive factor for*

*everyone involved."*

*"Some of the very positive things that came out of the evaluation ... were never publicized or brought forward in any way. That (particular) information was a very pleasant surprise for many of us working on the evaluation team and the kind of information that needed to be conveyed to the system."*

*"... the first thing that comes to mind is the connection I was able to make with (certain evaluation team members)."*

*"When I think about the action plan developed after the evaluation and the changes that have been made because of it, I'm a little disappointed .... many of the suggested courses of action have not been followed."*

*"I learned a lot about the evaluation process and I met and befriended some wonderful people, especially the evaluation committee members .... My involvement was influential with other principals because principals tend to accept requests associated with other principals. Also, the influence and involvement of principals and teachers in the training workshop for collecting observational data was invaluable."*

*"From the beginning I felt that it was important that there be some "accountability" to the (implementation) process and therefore I was pleased that the evaluation was an integral part of implementation."*

*"I learned a lot about the following: the system process and hierarchy, capturing and analyzing valid data, the structure of an evaluation, the structure of the program department and the involvement of system representatives in the evaluation."*

*"Perhaps I should start by indicating that I am a very strong believer in providing opportunity for teachers to accommodate their "ownership" of the particular issue at hand. Only by having their input and a sense that they are part of the decision will change occur. I believe that I, along with other evaluation team members, were given the opportunity and latitude to effect a constructive and meaningful evaluation."*

*"I also detect signals ... that the action plan was laid on from "above" and that this plan criticized (teachers') credibility--and therefore they tended to be on the defensive .... Having said this, slowly but surely change is occurring as a direct result of the evaluation."*

## ***Findings 2: Questionnaires***

*The purpose of this section is to summarize the findings from the questionnaire responses and to share some preliminary analyses.*

### ***Characteristics of the Evaluations: Closed Items***

*A seven point Likert scale was used to assess six characteristics of evaluations (Cousins and Leithwood, 1986). Credibility and relevance of the evaluations received the highest overall ratings. The extent to which the findings matched expectations, the overall quality of the evaluations and the timeliness of the findings for decision-making were also rated highly. The nature, amount and quality of communication about the results was given a low rating.*

*Utilization was also included in this question as a characteristic of the evaluation. This characteristic received the lowest rating. Responses to this item were used as the dependent variable, utilization, in subsequent correlation analyses.*

### ***Factors Influencing Utilization: Closed Items***

*Respondents were asked to use a seven point Likert scale to indicate the level of influence of nineteen items on evaluation utilization. Five factors were identified as having a significant correlation with utilization. The two areas having highly significant correlations with utilization included the extent to which the findings were in agreement with the expectations ( $r=0.70$ ) and the commitment,*



*involvement and/or resolution of the school district's Superintendent of Program (r=0.83). Three additional factors that had a significant correlation with utilization included the overall quality of the evaluation, the nature and quality of communication, and the involvement of primary users in the evaluation.*

#### ***Evaluation Process: Closed Items***

*Based on responses using a five point Likert scale, the process used in previous evaluations was rated positively in the following areas: technical assistance provided by the school district's researcher, joint responsibility among evaluation team members, primary users who learned on the job, primary users who were involved in the "nuts and bolts" of the evaluation, and the partnership between a trained evaluation person and primary users. In addition, primary users were seen to be very supportive of the evaluation process and the goals and activities. They also valued the interpretation part of the evaluation process. Lowest ratings indicated that the action plan was not well implemented and that primary users were rarely involved in developing the action plan. (see footnote)*

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*Footnote: It should be noted that the action plan is a decision making activity and is not part of the formal evaluation process. The evaluation team's responsibility includes interpreting the findings and developing suggested courses of action (recommendations) based on the findings. It is then the policymaker's responsibility to develop and implement an action plan.*

*A factor analysis of the questionnaire items dealing with the evaluation process identified two key factors. The first (with an eigen value of 6.96) included items that dealt with activities related to planning and conducting the evaluation. The second factor (with an eigen value of 3.67) included items related to the development and implementation of the action plan based on the findings of the evaluation.*

#### ***Involvement of Primary Users: Closed Items***

*A five point Likert scale was used to document responses. The findings indicated that primary users learned a great deal about the "nuts and bolts" of doing an evaluation, viewed their involvement as a valuable staff development process and considered the evaluation to be a positive experience. In addition they learned more about the program, developed a stronger relationship with the internal evaluator as well as at least one other member of the evaluation team, and believed that they made a worthwhile contribution to the review process. On the other hand, respondents reported few subsequent opportunities to use their new found expertise and indicated that they had received limited recognition for their efforts.*

*Once again factor analysis of those items dealing with the involvement of primary users in the evaluation process identified two key factors. The first factor (with an eigen value of 4.39) included items related to empowerment issues. The*

*second factor (with an eigen value of 2.94) dealt with staff development issues.*

### ***Rating of Organizational Culture: Closed Items***

*Items related to organizational culture were also rated on a five point Likert scale and responses were consistently lower than those given to items related to the evaluation process and primary users' involvement in the evaluation process. There was, however, general agreement that primary users were given support to participate in the evaluation, that primary users were motivated to participate, and that the evaluation was an integral part of the implementation process. Respondents, however, were less inclined to rate the system as being committed to organizational learning or inquiry as a way of enhancing learning and empowering staff. Furthermore, most primary users were not fully aware of the scope of the task before agreeing to participate in a review*

*A factor analysis of items also found two key factors. The first (with an eigen value of 5.91) included items that specifically described the system's culture as it related to evaluation. The second factor (with an eigen value of 2.01) encompassed the notion of system support for evaluation.*

### ***Pros and Cons of Using a Participatory Approach: Open Ended***

*There was overwhelming support for the quality of the professional development. In addition, the empowerment, increased understanding and ownership of the*

*evaluation process were identified as important outcomes. Respondents believed that it was important to have involvement of those who were ultimately responsible for making resulting changes. The participatory approach was also seen as a way of keeping the evaluation practical and honest. On the other hand, a great deal of time is required. Also, involvement of primary users does not seem to guarantee utilization. Responses highlighted the need for commitment by senior administration; the process must be valued and used to inform decision making.*

#### ***Factors Affecting the Utilization of Evaluation Findings: Open Ended***

*Budget was identified several times as a limiting factor, especially in a time of limited resources. Several responses mentioned the need for evaluation to be seen as an integral part of the decision-making process. This includes a commitment to follow through with and implement the action plan. Related to these issues is a commitment to the evaluation process and the resulting action plan by system and school administrators as well as staff. Responses suggested that this commitment is generally lacking in this system. The need for better communication - about the evaluation process and the findings - was also mentioned. Factors mentioned most often in the responses included: limited budget, lack of commitment of senior staff, commitment of key individuals, commitment of the evaluation team, lack of system commitment to the action plan process.*

### ***Conditions Likely to Benefit the System and Primary Users: Open Ended***

*Several respondents mentioned improving the development and implementation process of the action plan. In addition more commitment, support, understanding and involvement of senior staff were seen as important. Several persons indicated that the system must value and use the results of the evaluation studies. There should also be more effort to support primary user release from other duties as well as the involvement of primary users in framing and implementing the action plan.*

### ***Value of Participatory Evaluation: Open Ended***

*Previous evaluations in the school district were generally characterized as being highly credible and reliable. In addition, the findings and evaluation quality and timeliness were seen as relatively high. On the other hand, evaluations were rated less well in terms of communication and time taken to complete the study. Utilization was deemed to be generally low.*

### ***General Comments: Open Ended***

*There was a number of comments expressing gratitude for the opportunity to be involved and stressing the positive nature of the experience. Comments were very supportive of the evaluation process. There was, however, concern about the lack of or inappropriateness of follow up activities, especially related to the action plan.*

### *Preliminary Analysis of Relations Among Key Variables*

*Using the review of the literature, open ended responses, the content analysis of the written correspondence, descriptive analyses of the questionnaire responses and the results of the focused group discussion as guides, a number of key factors were targeted for further analysis. For example, correlation matrices were calculated so as to examine the association among a number of items.*

*Several different regression equations were also posited and examined. In these cases the dependent variable was the utilization of the evaluation findings, that is, the respondents' judgement about the extent to which the findings and suggested courses of action were implemented. In the context of this school district, utilization involves decisions about the nature and operation of the program as well as decisions about program management. It also includes some aspects of use as education (Cousins and Leithwood, 1986).*

*Statistically significant linear relationships with utilization were found for six independent variables: first - the commitment, involvement and/or resolution of the school district's Superintendent of Program, second - the quality of communication, third - the quality of the review, fourth - the extent to which findings agreed with expectations, fifth - the involvement of primary users in the evaluation, and sixth - the factor containing several items describing the system's culture related to evaluation. In these cases multiple R was 0.72, 0.71, 0.68,*

0.67, 0.59 and 0.58 respectively; the *F* value for each regression equation was significant at the .01 level. When a regression equation is formed using stepwise selection of the above six variables, three independent variables are selected. The multiple *R* is 0.94 and the *F* value is also significant at the .01 level.

These initial examinations of relations among variables are limited by the very small sample size in the present study. This critical limitation acknowledges the possibility of bias and a potentially inflated multiple *R*. Nevertheless, the results tend to support links of these variables with evaluation utilization.

### *Findings 3: Focused Group Discussion*

The focused group discussion involved several primary users in a discussion about the value and impact of participatory evaluations in this school district. Individuals based most of their comments on the specific evaluation and context that they had experienced. Once again, the value of the review as a professional development and a collaborative learning experience was emphasized. The sense of competence and empowerment that accrued was characteristic of each evaluation project. Without exception there was support for the multiple data collection methods and the perceived relevance of the data collected. Primary users welcomed the opportunity to participate in the evaluation process and to collect data that could be used as the basis for subsequent action.

*On the other hand, concerns were expressed about a number of issues related to the evaluation and, in particular, the development and implementation of the resulting action plan. For example, there was concern that the evaluation tends to take on a life of its own. With limited resources there was a feeling that the evaluation took too much time and required labour intensive involvement. This was especially true when compared to the seemingly limited time, resources and energy devoted to implementing follow-up activities related to the action plan. In addition, there was uncertainty and confusion as to whether the system really valued the evaluation process, especially when the findings indicated significant (as determined by the evaluation team) areas that required improvement. Furthermore, evaluation utilization was seen to be easily influenced by changing political and economic circumstances, beyond the control of staff within the system. It appeared that policymakers were consistently overwhelmed by other matters and repeatedly delayed or proceeded very cautiously, if at all, with an action plan.*

*Although there was general consensus that the protocol and procedures for doing evaluations had progressed significantly, there was also a strong feeling that evaluations were still not integrated into the system's way of doing business. It was suggested that the participatory nature of evaluation is very much limited by structures that are not always supportive of nor in tune with using the results of evaluation studies.*



## *Conclusion*

*The present research study provides specific feedback on the program evaluation model used in this school district. It also reinforces a number of issues identified in the literature related to participatory evaluation and evaluation utilization.*

*As an initial attempt to come to terms with some of the findings of this research study, the following reflective statements are posited. They provide a basis for further improvement and refinement of the program evaluation model used in this school district.*

- \* Organization structures and power relations need to support better participatory program evaluation, including evaluation utilization. Program evaluation should be integrated into the system's way of doing business.*
  
- \* It is important to develop a strategy for ensuring that the action plan is developed and implemented.*
  
- \* The involvement of primary users in the evaluation process results in positive staff development, feelings of empowerment, and a sense of competence about evaluation issues and procedures.*

- \* *There must be further involvement of primary users in the system and follow-up using their expertise acquired during the evaluation.*
  
- \* *Communication about the evaluation process - all stages - must be improved and be of the highest quality.*
  
- \* *The current climate of political, economic and educational change demands prompt and efficient use of time and resources.*
  
- \* *Evaluation must be valued and seen to be valued; this can be demonstrated by acting on the findings of the evaluation.*
  
- \* *Efforts should be made to understand better the perceptions and demands on policymakers so that the design, conduct and use of evaluations can be better planned.*

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