Patricia Sawin, UNC Anthropology

INSTRUCTION MANUAL

Toolkit for Evaluating K-12 International Outreach Programs

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CHAPTER 1

Introduction

This Evaluation Manual is designed to help users in K-12 International Outreach Programs utilize evaluation to answer questions about their programs. Used in conjunction with the companion Evaluation Tool Kit on this website, the Evaluation Manual will help users develop basic competence and confidence in designing and implementing evaluations that address particular program needs.

The Evaluation Manual is intended as a reference work. It should be consulted as the evaluation progresses, not read once and put aside. As a reference, it should help users plan, implement, and make sense of program evaluations. As this Evaluation Manual is designed for use with the Evaluation Tool Kit, examples throughout refer to generic K-12 International Outreach Programs and to the compendium of instruments included in the Evaluation Tool Kit.

The Evaluation Tool Kit and Evaluation Manual are specifically designed for K-12 International Outreach Programs. Other audiences may find the information useful but not specifically designed to meet their particular programmatic needs.

How to Use the Evaluation Manual

K-12 International Outreach Programs

K-12 International Outreach Programs engage educators and students in learning about other countries, cultures, and international current events. To that end, such programs provide timely and accurate teaching resources to schools and teachers. Outreach services help incorporate international education components into classroom curricula.

Although K-12 International Outreach Programs are offered in school districts nationwide, little formal evaluation occurs to determine their effectiveness. The U. S. Department of Education (USDOE) recognized that quality evaluation could serve a number of program purposes as defined below and they funded a number of projects to strengthen evaluation strategies for K-12 International Outreach Programs. In response to the USDOE request for proposals, Evaluation, Assessment and Policy Connections (EvAP) in the School of Education at UNC-Chapel Hill worked with the Center for Global Initiatives (formerly the University Center for International Studies, or UCIS) at UNC-Chapel Hill to design and implement the three-year project that eventually led to the development of the Evaluation Tool Kit and Evaluation Manual for K-12 International Outreach Programs.

The Evaluation Tool Kit

This Evaluation Manual is a companion to the Evaluation Tool Kit. The Evaluation Tool Kit contains resources designed to allow K-12 International Outreach Programs to *manage* data related to program planning and delivery, as well as *develop* instruments to collect useful evaluation information. The decision was made early on that the Evaluation Tool Kit resources would be made available to K-12 International Outreach Programs via the internet, so that they could download prototypical database management programs and design surveys tailored to their needs. Thus, one part of the Tool Kit focuses on *data management* using simple tables in both Microsoft© Excel or Microsoft© Access. The Excel and Access databases provide two options for K-12 International Outreach Programs to manage their program information needs, which will suit different situations, depending on the number of services a program provides.

The second part of the Evaluation Tool Kit focuses on *data gathering* through the development of instruments (e.g., surveys and focus group protocols) that will help programs collect information to answer important evaluation questions. An array of data gathering items for different audiences and purposes has been organized into a "survey generator." The Survey Generator function of the Evaluation Tool Kit allows programs to build surveys and other tools to gather information from participating teachers, students, presenters, and program administrators for different purposes. Programs can, for example, customize a survey just for elementary students who attend a presentation or create a focus group protocol to find out about presenters' experiences. In turn, the data collected with these instruments can be used to answer key evaluation questions posed by the K-12 International Outreach Program.

Both parts of the Evaluation Tool Kit are located on the UNC-Chapel Hill Center for Global Initiatives' website (http://gi.unc.edu) under Evaluation Tool Kit (http://gi.unc.edu/k12toolkit). Chapter 3 of this Evaluation Manual explains how to use both of these features of the Tool Kit in greater detail.

Using this Evaluation Manual with the Evaluation Tool Kit

The Evaluation Manual and Evaluation Tool Kit are companion pieces that K-12 International Outreach Program staff and/or evaluation personnel can use to develop and implement comprehensive evaluations for their programs. Using this Evaluation Manual and the accompanying Evaluation Tool Kit, programs will be able to:

- Better understand the components of evaluation and develop or clarify Evaluation Questions (Chapter 1)
- Complete a Logic Model to plan and guide the evaluation (Chapter 2)
- Organize and manage Data Collection (Chapter 3)
- Summarize the Collected Data (Chapter 4)
- Write Evaluation Reports and Use Findings (Chapter 5)

Using the Evaluation Tool Kit and the Evaluation Manual in this way will enable programs to determine the extent to which they provide outreach services, meet expectations, and achieve desired outcomes. This Evaluation Manual describes methods to plan and implement effective evaluations. The Tool Kit provides sample items and instruments for quality data collection.

Optimally, program staff members will use the Evaluation Manual and Evaluation Tool Kit together to gather pertinent information about their programs. Such information might help in managing the program, improving program processes, and determining outcomes. Used in these ways, evaluation can serve to enhance program success.

To make the most of this Evaluation Manual and Tool Kit, programs must devote the time and energy to identifying the big-picture questions to ask about their programs. Programs that devote significant time to understanding evaluation (Chapter 1) and evaluation planning (Chapter 2), will be able to take full advantage of available data collection instruments (Chapter 3), successfully use the data analysis procedures (Chapter 4), and effectively report their findings (Chapter 5). Programs that have a sense of their program goals and evaluation needs will best be able to imagine how evaluation can help improve their program; and therefore, will successfully gather information that leads to program improvement.

A Glossary of evaluation terms is included at the end of this Evaluation Manual to help programs new to evaluation orient themselves to a number of specialized evaluation terms. Additional Resources (e.g., web links, professional organizations, etc.) also are included at the end for those wanting to learn more about evaluation.

Limitations to Evaluation

This Evaluation Manual and the Evaluation Tool Kit will help programs with many dimensions of quality evaluation. There are, however, limitations to what programs can measure using these resources. These resources are not designed to measure program qualities/effects such as sustainability, collaboration, systems change, long-term impact, and student achievement. Programs interested in these dimensions are encouraged to work with external evaluators to develop more wide-ranging evaluation plans.

What and Why of Evaluation

What is Evaluation?

Simply put, evaluation provides a systematic way to answer questions about a program. Through the evaluation process, program staff frame questions and collect information to determine the quality of the program, the effectiveness of the program, and/or how it might be improved.

Evaluation questions vary from one program to another. However, because K-12 International Outreach Programs serve similar purposes, similar evaluation questions across programs are likely. Questions can be posed and data collected to help programs monitor their processes and activities or assess their outcomes. Examples of questions programs might want to answer related to these categories are included in Table 1.1: Evaluation Questions:

Table 1.1: Evaluation Questions

Program Processes	**Program Activities**	**Program Outcomes**
Are our program goals clear? Do staff and participants understand our program goals? Can they articulate them to others?	How many schools did we serve this year? Were they representative of our service area?	Did the program benefit its participants? Did students report changes in cultural understanding as a result of our programs?

Beginning with these questions, K-12 International Outreach Programs can determine how well they are doing and how they might improve. Responses to these questions will help programs determine the *next* set of questions such as "How can we help staff and participants better understand our program goals?" and "How might we improve coverage in our service area?"

Why Evaluate?

Evaluation provides information that program staff can use for a variety of purposes. Internal to the program, evaluation can identify program strengths and help staff make decisions about what activities should be continued, modified, and/or expanded. It also can identify areas that need improvement and help staff determine how they might change to better serve their purposes.

In reality, a common reason for program evaluations is that funding sources require it. Most private funders and all federally funded projects now require a formal evaluation, sometimes by an "outside" contractor, known as an external evaluator.

Again, the answers to "why evaluate?" will vary from one program to another.

However, some common reasons for program evaluation include:

- Identify program strengths and weaknesses
- Determine how the program can improve
- Assess the impact of the program
- Garner support for continuing or expanded funding
- Justify requests for additional resources
- Meet the requirements of funding sources
- Disseminate program information and findings

Regardless of the reasons for evaluation, the evaluation process described in this Evaluation Manual and supported by the Evaluation Tool Kit will help users develop more comprehensive evaluation plans. By using the two together, program staff can design and implement evaluations that will meet their particular needs.

Evaluation Map

Programs usually follow a general sequence of steps when evaluating a program. These steps are laid out in the Evaluation Map below (Figure 1.1). The subsequent chapters of this Evaluation Manual guide program staff through these steps.

1.	2.	3.	4.	5.	6.	7.	8.
Determine Program Goals & Objectives	Plan Program Activities	Identify Desired Outcomes	Choose Evaluation Tools	Collect Data	Summarize Data	Report Findings	Use findings to revise goals & objectives and improve program

Figure 1.1: Evaluation Map

Evaluation Approach Choices

A variety of program evaluation approaches have developed over time and are available to evaluators. These approaches are described in the Evaluation Approaches table below. These different approaches vary in their primary focus and how they define the audience(s) for the evaluation findings.

The answer to the "why evaluate?" question will determine which approach(es) might best "fit" a program's needs. Often, more than one approach is needed. In those cases, it is appropriate to "mix and match" to develop a combined approach that will address the evaluation purpose(s).

Evaluation Approaches

Six approaches can be used to group the vast majority of evaluation practices: 1) Objectives; 2) Management; 3) Consumer; 4) Expertise; 5) Adversary; and 6) Participant. These approaches are listed in Table 1.2 below, with example descriptions and intended primary audiences. The evaluation approach should not drive the evaluation design. Rather, a program's evaluation needs drive the design which, in turn, determines which approach(es) best meet that program's needs and evaluation purposes

Table 1.2: Evaluation Approaches

Approach	Primary Focus	Audience/Who Wants to know?
1. OBJECTIVES	To what extent has program achieved its intended outcomes?	Program Sponsors, Managers
2. MANAGEMENT	What part did program elements (e.g., context, process, products) play in program implementation?	Program Managers, Staff
3. CONSUMER	How does this program compare to other similar programs?	Program Sponsors, Public
4. EXPERTISE	How would experts in this field rate this program?	Peer Group, Public
5. ADVERSARY	What does this program do well? Not so well?	Program Sponsors, Public
6. PARTICIPANT	To what extent are participant/stakeholder needs addressed?	Participants, Staff, Community Members

(Adapted from Kirkpatrick, J.L., Sanders, J.R., & Worthen, B.R., (2003). *Program Evaluation: Alternative Approaches and Practical Guidelines, (3rd ed.).* Boston, MA: Addison-Wesley Publishing)

For instance, K-12 International Outreach Programs using the Evaluation Tool Kit to develop program evaluations will likely combine several of the approaches. For example, if a program needs to show board members what progress the program has made toward meeting stated goals, the OBJECTIVES approach will help determine to what extent program goals are met. Programs that need to decide which service strategies have been most successful will use the MANAGEMENT approach to help program staff monitor the quantity and quality of program activities. For a program that needs to be attentive to diverse stakeholders in the communities they serve, the PARTICIPANT approach will help ensure that the evaluation meets the needs of stakeholders.

Summary

This chapter introduced the Evaluation Manual and outlined reasons why evaluation is a critical component of program success. The chapters that follow will help program staff plan an evaluation, select and manage data collection instruments, summarize the data collected, and write reports that can be utilized to improve the program.

CHAPTER 2

Evaluation Planning

Planning is critical to the evaluation process. Planning begins with understanding the program to be evaluated – what does the program seek to do and how does it go about it? With a clear understanding of the program, good decisions can be made about whether or not an evaluation is appropriate. Assuming the answer is "yes, let's evaluate," good planning will help programs focus on which aspects of the program need evaluating and how the evaluation should be implemented. This chapter is intended to help programs gain clarity about program goals and objectives, desired outcomes, and direction for evaluation.

The planning sequence presented in this chapter will walk program staff and other stakeholders through the process in a step-by-step manner. The result will be an evaluation that is focused, relevant, efficient, and useful to program staff and other identified audiences.

Recall the Evaluation Map introduced in Chapter 1. This chapter helps program staff think about steps 1-3.

1.	2.	3.	4.	5.	6.	7.	8.
Determine Program Goals & Objectives	Plan Program Activities	Identify Desired Outcomes	Choose Evaluation Tools	Collect Data	Summarize Data	Report Findings	Use findings to revise goals & objectives and improve program

Why Plan?

The cliché, "If you don't know where you're going, you're likely to end up somewhere else," is true of evaluation planning. Planning serves a number of purposes, including:

- Clarifies program goals and objectives
- Identifies activities that derive from those goals and objectives
- Articulates desired results from those activities
- Determines which of those goals and objectives might be evaluated
- Determines what kind(s) of evidence is wanted
- Matches evidence collected with evaluation questions
- Assesses the feasibility of conducting the evaluation
- Identifies the audience(s) for the evaluation results
- Keeps the evaluation process focused on the purpose

This chapter introduces a primary planning tool in the evaluation process, the Evaluation Planning Form, also known as a "logic model." Logic models can take many forms, but generally they are sequential displays of program events or intentions; they usually proceed from left to right across a page. This tool is designed to help programs visualize and document their goals, desired outcomes, and identify ways of collecting information that will document program progress.

Evaluation Planning in K-12 International Outreach Programs

K-12 International Outreach Programs are engaged in myriad activities that serve international students, public schools, universities, communities, and more. All of those program components can be evaluated. However, careful and deliberate evaluation planning will help users focus their resources (human, material, and fiscal) on what can and should be evaluated. It will help them avoid expending resources on asking unnecessary questions and/or collecting evidence that is either not important, cannot be measured, or is too difficult to gather.

One key means of limiting what is evaluated is to ask, "What audiences would be interested in this question?" (e.g., program staff, outside funders, the public, etc.). If no audiences would be interested in the findings, there is no point in collecting evidence to answer the question. In addition, if evaluating a particular component of the program would not serve the purposes of the evaluation, it is probably best left out.

Logic Model Example

A logic model is a graphic organizing tool that can facilitate program planning and evaluation (see Figure 2.1). The use of a logic model is key to planning and implementing a quality evaluation. This chapter explains the elements of a logic model by using a logic model for a typical K-12 International Outreach Program. The logic model also is called an Evaluation Planning Form.

In the template shared below (see Figure 2.1), completion of the first three columns is critical to good planning. Completing these columns helps program staff identify those **Goals and Objectives** that they wish to evaluate. Following the model ensures that program staff are clear about how those goals and objectives translate into program **Activities**. Further, the model helps users articulate what **Outcomes** or results they expect from those activities.

The last two columns of the logic model help users identify evidence to be collected, which will demonstrate whether or not desired results are attained. Both **Monitoring and Outcomes Evidence** are used to assess progress. The format of the logic model, as it flows from left to right, also ensures that the evidence proposed for collection is indeed directly related to the desired outcomes. Without such a model, energies are often spent gathering evidence that is not useful in determining whether or not goals and objectives have been met.

			MONITORING ACTIVITIES	EVALUATING OUTCOMES
Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**	**Evidence of Results**
Planning Elements			**Assessment Elements**	

Figure 2.1 Evaluation Planning Form (Logic Model)

The Evaluation Plan Form/Logic Model below is adapted from the planning documents of a K-12 International Outreach Program that partnered with the Center for Global Initiatives and EvAP in developing the Tool Kit. Using examples from a "real" program provides users good ideas about what types of goals and objectives might be evaluated in their programs. For the purposes of discussion, the program is called "International University" (IU) throughout the Evaluation Manual.

It is important to remember, however, that programs are unique. They exist in different contexts, and they have different goals. As mentioned above, programs always do more than can or should be evaluated. Part of the evaluation planning process is to limit the evaluation activities to those program aspects where evidence will be most useful to program staff and other stakeholders.

With that in mind, these examples will demonstrate how the columns on the Evaluation Planning Form/Logic Model might be completed.

Goals/Objectives

A program's goals and objectives are just that. This category asks you to think about: What purposes does the program serve? What does it seek to accomplish? Some people have very rigid definitions around the terms goals and objectives; others do not. There is no agreement in the field about whether to use Goals or Objectives, so for this Evaluation Manual these terms are combined.

Each program will have more goals and objectives than can be listed on the Evaluation Planning Form. Keeping the goals of the total program in mind, however, will help users narrow the list of possible goals/objectives to those that will be evaluated. International University chose to focus on the following four Goals/Objectives for their program. The list of goals selected for evaluation goes in the first column of the Evaluation Planning Form.

Goal/Objective
Enhance K-12 students' and teachers' understanding of different cultures
Improve international students' (presenters') English presentation skills
Expose international student presenters to the broader community and culture
Assist K-12 teachers in providing accurate cultural information to students

Activities

In the second column, program staff members list the activities they implement or plan to implement to achieve the stated goals and objectives. Note that multiple activities may be used to meet one objective. In this example, International University plans to *Conduct a weekly seminar for presenters*, *Encourage presenters to visit a variety of schools,* and *Advertise* *international student presentations to local school teachers* as activities to meet the goal of *exposing international student presenters to the broader community and culture.* Also, one activity may address multiple goals.

Goal/Objective	**Activities**
Enhance K-12 students' and teachers' understanding of different cultures	• Provide cultural presentations at 30 schools per semester
Improve international students' (presenters') English presentation skills	• Recruit international students to participate in the program • Conduct a weekly seminar where presenters plan presentations and practice English presentation skills
Expose international student presenters to the broader community and culture	• Conduct a weekly seminar for presenters • Encourage presenters to visit a variety of schools • Advertise international student presentations to local school teachers
Assist K-12 teachers in providing accurate cultural information to students	• Develop and provide educational materials and information to teachers • Provide opportunities for teachers to ask questions of presenters

Outcomes

In the third column, program staff members identify the expected outcomes or results for each activity. The information here answers the question, "Why?" Why are we implementing this particular activity? What do we expect the outcome to be? Language in this column often reflects change as programs hope to *increase* activities and/or skills (e.g., more presentations or increased understanding), or *decrease* a negative outcome (e.g., reduce numbers of dropouts). Specifying a target for the desired outcome can strengthen the Evaluation Planning Form/ Logic Model. For example, International University wants to present in at least 30 schools. Another program might want to increase school visits in the coming year by 30%, or double the number of international students providing presentations.

In the example below, International University hopes to: *Increase cultural presentations to at least 400 students in the school district* (outcome) by *Providing cultural presentations at 30 schools per semester* (activity) in hopes of contributing to the *Enhancement of K-12 students' and teachers' understanding of different cultures* (goal/objective). It may be challenging to complete this column as many program people know WHAT they want to do, but are less clear about what they expect to result from the activities they implement. However, completing the Outcomes column will help ensure that there is a clear purpose for all activities.

Goal/Objective	Activities	Outcomes
Enhance K-12 students' and teachers' understanding of different cultures	Provide cultural presentations at 30 schools per semester	• Increase cultural presentations to at least 400 students in the school district • 80% of students and teachers will report increased knowledge of international culture
Improve international students' (presenters') English presentation skills	• Recruit international students to participate in the program • Conduct a weekly seminar where presenters plan presentations and practice English presentation skills	• 10 new international students will present in schools • Each presenter will rehearse presentations and receive feedback from peers before going into schools • 80% of presenters will report increased self-confidence in presentation skills
Expose international student presenters to the broader community and culture	• Conduct a weekly seminar for presenters • Encourage presenters to visit a variety of schools • Advertise international student presentations to local school teachers	• 80% of presenters will report increased knowledge of American culture & the local community • 90% of presenters will visit at least two different schools
Assist K-12 teachers in providing accurate cultural information to students	• Develop and provide educational materials and information to teachers • Provide opportunities for teachers to ask questions of presenters	• Teachers will report increased access to accurate information about other cultures • Teachers will report enhanced interactions with people from other cultures

Building targets into the Outcomes column provides a marker of what the program considers a successful outcome for an activity. It also helps programs identify what evidence defines program success.

Evidence of Activities & Quality

In column 4 of the Evaluation Planning Form/Logic Model, the emphasis shifts from planning to *monitoring* the work performed. Here program staff members list the instruments and forms they currently use or plan to use to collect data, which will demonstrate that the activities have occurred. These instruments and forms provide evidence that monitor the extent to which desired outcomes are being met – the extent to which the program was able to implement the activities. This column also includes evidence of *how well* the activities were implemented. In evaluation terms, this is formative evaluation and provides opportunity to identify and correct any problems that may occur. For instance, if recruiting efforts (activity) do not result in new program participants/ presenters (outcome), new strategies might be implemented earlier rather than later.

These instruments and forms provide evidence that monitor the extent to which desired outcomes are being met.

Considering the International University Evaluation Planning Form, a database that logs school visits is a tool to help monitor opportunities for students' and teachers' enhanced understanding of different cultures (goal/objective), as provided through cultural presentations (activities). This column focuses on tools and instruments that monitor whether an event happened and some indicator of the quality of that event. In our example, student feedback forms will be used to provide information about the quality of the presentations. As the next section indicates, the final column (Evidence of Results) focuses on the results of the activities and how well it helped achieve desired outcomes.

			MONITORING ACTIVITIES
Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**
Enhance K-12 students' and teachers' understanding of different cultures	Provide cultural presentations at 30 schools per semester	• Provide cultural presentations to at least 400 students in the school district • 80% of students and teachers will report increased knowledge of international culture	Database of school visits for the year Student feedback forms Teacher feedback forms
Improve international students' (presenters') English presentation skills	• Recruit international students to participate in the program • Conduct a weekly seminar where presenters plan presentations and practice English presentation skills	• 10 new international students will present in schools • Each presenter will rehearse presentations and receive feedback from program staff and peers before going into schools • 80% of presenters will report increased self-confidence in presentation skills	Recruitment flyers, posters, & emails on campus Database of school visits by presenters Presentation evaluation forms that program staff and peers complete during rehearsals Presenter self-evaluation/feedback forms
Expose international student presenters to the broader community and culture	• Conduct a weekly seminar for presenters • Encourage presenters to visit a variety of schools • Advertise international student presentations to local school teachers	• 80% of presenters will report increased knowledge of American culture & the local community • 90% of presenters will visit at least two different schools	Agendas for weekly seminars Advertisements for international student presentations sent to schools and teachers Presenter self-evaluation/ feedback forms Notes from post-visit seminar discussions
Assist K-12 teachers in providing accurate cultural information to students	• Develop and provide educational materials and information to teachers • Provide opportunities for teachers to ask questions of presenters	• Teachers will report increased access to accurate information about other cultures • Teachers will report enhanced interactions with people from other cultures	Copies of materials provided to teachers Database records of requests for presenters or information

Evidence of Results

The fifth column of the Evaluation Planning Form/Logic Model provides space for the program staff to list the evidence they collect to demonstrate that the specified outcomes have been *achieved.* Column 3 (Outcomes) identifies the results that the program *expects* the activities to accomplish. This column "tells" what evidence will support the fact that those outcomes are achieved.

			MONITORING ACTIVITIES	EVALUATING OUTCOMES
Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**	**Evidence of Results**
Enhance K-12 students' and teachers' understanding of different cultures	Provide cultural presentations at 30 schools per semester	• Increase cultural presentations to at least 400 students in the school district • 80% of students and teachers will report increased knowledge of international culture	Database of school visits for the year Student feedback forms Teacher feedback forms	Database of school visits Previous Year's Accomplishment Report Results of student, teacher, & presenter feedback forms
Improve international students' (presenters') English presentation skills	• Recruit international students to participate in the program • Conduct a weekly seminar where presenters plan presentations and practice English presentation skills	• 10 new international students will present in schools • Each presenter will rehearse presentations and receive feedback from program staff and peers before going into schools • 80% of presenters will report increased self-confidence in presentation skills	Recruitment flyers, posters, & emails on campus Database of school visits by presenters Presentation evaluation forms that program staff and peers complete during rehearsals Presenter self-evaluation/feedback forms	Results of program staff, peer, presenter, and teacher feedback forms Results of program participants' focus group
Expose international student presenters to the broader community and culture	• Conduct a weekly seminar for presenters • Encourage presenters to visit a variety of schools • Advertise international student presentations to local school teachers	• 80% of presenters will report increased knowledge of American culture & the local community • 90% of presenters will visit at least two different schools	Agendas for weekly seminars Advertisements for international student presentations sent to schools and teachers Presenter self-evaluation/feedback forms Notes from post-visit seminar discussions	Results from presenter and student feedback forms Tallies of references (within & outside seminars) to community involvement
Assist K-12 teachers in providing accurate cultural information to students	• Develop and provide educational materials and information to teachers • Provide opportunities for teachers to ask questions of presenters	• Teachers will report increased access to accurate information about other cultures • Teachers will report enhanced interactions with people from other cultures	Copies of materials provided to teachers Database records of requests for presenters or information	Results from teacher feedback forms Summaries from teacher focus groups

The two evidence columns (Monitoring Activities and Evaluating Outcomes) list the variety of tools and instruments International University uses to collect data and evaluate program effectiveness. These tools and instruments include: last year's Accomplishment Report; a database of presentations and presenters; as well as various feedback forms that presenters, students, teachers, and program staff complete. In addition, focus groups are held for presenters and teachers to collect data about the program.

K-12 Outreach Program Example

Program staff will understand how overall program goals and objectives "drive" the selection of particular activities.

In the example below (Figure 2.2), the complete International University's Evaluation Planning Form/Logic Model is presented. Remember that this is ONLY an example to demonstrate how the columns are related to one another. Each K-12 International Outreach Program will develop a unique Evaluation Planning Form/Logic Model based on the Goals/Objectives that the program chooses to evaluate.

By studying this example, program staff will understand how overall program goals and objectives "drive" the selection of particular activities. Those activities are selected because program staff members expect them to result in desired outcomes.

Once the activities and outcomes have been established, columns 4 and 5 focus on the evidence that supports the attainment of both. Column 4 lists the evidence that will be collected to monitor both the implementation and the quality of program activities. The final column lists the evidence that will be collected to determine outcome accomplishments.

It is especially important to understand the programmatic relationships among the columns on the Evaluation Planning Form. Reading from left to right, there is a direct relationship across the row among goals and objectives, activities, outcomes, monitoring, and outcome evaluation.

Thoughtful and careful planning and completion of the Evaluation Planning Form will help users ensure that the evaluation is focused and will serve the intended purposes. It also will prevent wasted resources collecting evidence that is not directly related to the stated outcomes.

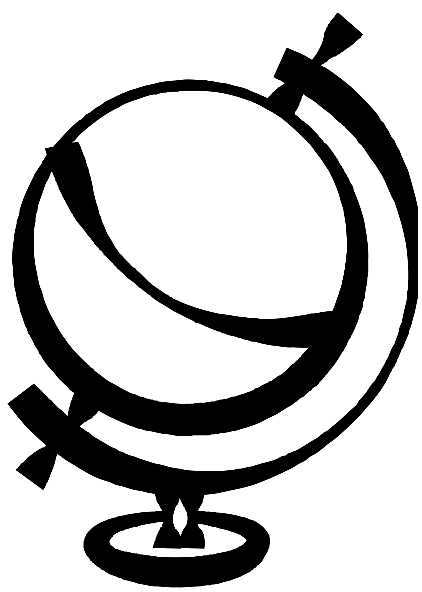
			MONITORING ACTIVITIES	EVALUATING OUTCOMES
Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**	**Evidence of Results**
Enhance K-12 students' and teachers' understanding of different cultures	Provide cultural presentations at 30 schools per semester	• Increase cultural presentations to at least 400 students in the school district • 80% of students and teachers will report increased knowledge of international culture	Database of school visits for the year Student feedback forms Teacher feedback forms	Database of school visits Previous Year's Accomplishment Report Results of student, teacher, & presenter feedback forms
Improve international students' (presenters') English presentation skills	• Recruit international students to participate in the program • Conduct a weekly seminar where presenters plan presentations and practice English presentation skills	• 10 new international students will present in schools • Each presenter will rehearse presentations and receive feedback from program staff and peers before going into schools • 80% of presenters will report increased self-confidence in presentation skills	Recruitment flyers, posters, & emails on campus Database of school visits by presenters Presentation evaluation forms that program staff and peers complete during rehearsals Presenter self-evaluation/feedback forms	Results of program staff, peer, presenter, and teacher feedback forms Results of program participants' focus group
Expose international student presenters to the broader community and culture	• Conduct a weekly seminar for presenters • Encourage presenters to visit a variety of schools • Advertise international student presentations to local school teachers	• 80% of presenters will report increased knowledge of American culture & the local community • 90% of presenters will visit at least two different schools	Agendas for weekly seminars Advertisements for international student presentations sent to schools and teachers Presenter self-evaluation/feedback forms Notes from post-visit seminar discussions	Results from presenter and student feedback forms Tallies of references (within & outside seminars) to community involvement
Assist K-12 teachers in providing accurate cultural information to students	• Develop and provide educational materials and information to teachers • Provide opportunities for teachers to ask questions of presenters	• Teachers will report increased access to accurate information about other cultures • Teachers will report enhanced interactions with people from other cultures	Copies of materials provided to teachers Database records of requests for presenters or information	Results from teacher feedback forms Summaries from teacher focus groups

Figure 2.2 International University Evaluation Planning Form

Again, remember that this is an example of what an Evaluation Planning Form/ Logic Model might look like. The form will look different for each K-12 International Outreach Program. Programs may choose to begin their own forms “fresh” or use the International University example as a beginning point.

Editing Your Logic Model

The next step in developing a quality evaluation form is to review, critique, and edit the Evaluation Planning Form. The rubric below (Figure 2.3) is designed to help program staff accomplish this step. By answering the questions in each column and making necessary adjustments, users can be confident that they have developed a good plan.



				MONITORING ACTIVITIES	EVALUATING OUTCOMES
	Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**	**Evidence of Results**
Within cells: Are all columns filled out?	Is each goal/ objective clearly stated? Do you list all goals/ objectives? Are goals/ objectives comprehensive to all elements of the program?	Have you listed *all* activities that will address each objective? Is description of each activity specific? For example: What? For whom? How often? How many? Is your timeline realistic for accomplishing Activities? If not, can activities be broken into smaller components with more specific timelines? Are staff sufficient to implement activities?	Is it clear what you hope to change as a result of your program? Are Outcomes listed here specific? Do Outcomes specify targeted audience? Does language reflect desired change (e.g., an increase or decrease)? Have you identified what degree of change (i.e., % of change) you expect to see? Are Outcomes listed here realistic?	Are elements sufficiently specific? For example, • NUMBER of sessions • LENGTH (1/2 day; 2 hour) of sessions • DURATION (1 time, over two weeks) of sessions Do you give NUMBERS of participants TARGETED (e.g., per session, overall)? Are proposed numbers realistic?	Is it clear how desired outcomes will be measured? Are stated measures specific? Do you state HOW you will measure (e.g., with a specific survey)? WHO will be measured? For WHAT PURPOSES will they be measured? Are stated measures appropriate to audience? For example, how will you assess young children? Are proposed performance targets realistic?
Between Cells: Is there a logical progression from Goals & Objectives to Outcomes?	Does each Goal/ Objective have corresponding Activities and Outcomes?	Is it clear how activities will meet desired Goals/Objectives?	Is it clear how the outcome relates to activities and goals/ objectives?	Are measures included that account for all program activities?	Do measures clearly link to stated outcomes?
Table format: How you organize this table can facilitate connections between columns.	Each Goal may have	One… …or more Activity. Use Split Cell function to indicate multiple Activities for one Goal/Objective.	You can continue… … to Split Cells… … to indicate several outcomes…. …for each activity. Find Split Cells function in Table pull down menu,		

Figure 2.3 Evaluation Planning Form Rubric

This rubric is divided into three sections. The first set of questions ("Within Cells") helps program staff develop comprehensive Evaluation Planning Forms. Answering these questions helps programs provide adequate detail to the form. The second set of questions ("Between Cells") helps program staff consider consistency and flow across the whole document. The final section provides pointers on format to help program staff consider the "readability" of the Evaluation Planning Form.

A blank Evaluation Planning form is included here. Remember that this is a living document and can be manipulated for individual programs. Some programs, for example, may choose to rearrange the table so that the Monitoring Activities column is beside the Activities column and the Evaluating Outcomes column is beside the Outcomes column (see below). Program staff are encouraged to use the model that best serves the program's needs.

Sample A:

			MONITORING ACTIVITIES	**EVALUATING OUTCOMES**
Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**	**Evidence of Results**

Sample B:

		MONITORING ACTIVITIES		EVALUATING OUTCOMES
Goals and Objectives	**Activities**	**Evidence of Activities & Quality**	**Outcomes**	**Evidence of Results**

Summary

This chapter introduced program staff to critical steps in evaluation planning. In particular, the Evaluation Planning Form/Logic Model was shared as a central tool for program planning and evaluation. Chapter 3 introduces program staff to program management and data collection tools and procedures.

CHAPTER

3

Collecting Evaluation Data

As discussed in Chapter 2, it is vitally important to decide what program activities and outcomes to evaluate. The Evaluation Planning Form (Logic Model) is an important tool for thinking about activities and outcomes. Once those decisions are made, the next steps involve identifying what data can best answer the evaluation questions about those activities and outcomes.

This chapter will help users make wise choices about what data to collect. First, it discusses data management in general and the various components of data collection or information gathering that are common to most K-12 International Programs. Then it provides guidelines on how to recognize good instruments for data collection. Finally, it will demonstrate how to use the data collection instruments provided in the Evaluation Tool Kit, which can be used as they are or modified to meet the needs of particular programs. On the Evaluation Map, this chapter focuses on the 4th and 5th steps:

1.	2.	3.	4.	5.	6.	7.	8.
Determine Program Goals & Objectives	Plan Program Activities	Identify Desired Outcomes	Choose Evaluation Tools	Collect Data	Summarize Data	Report Findings	Use findings to revise goals & objectives and improve program

Data Management

Planning ahead to monitor the data collection process will keep the task organized and lead to more successful evaluations. As the Evaluation Planning Form/Logic Model (Chapter 2) demonstrated, Columns 4 (Monitoring) and 5 (Outcomes) describe what actual evidence will be collected. Monitoring evidence provides information on specifics of program *activities*. Outcomes evidence provides data on "*results*," demonstrating to what extent the desired outcomes are achieved.

Planning ahead to monitor the data collection process will keep the task organized and lead to more successful evaluations.

First, though, it is important to think through and plan for the *management* of data collection. If such a plan is in place before any data collection begins, the process will be smoother and the result will be a better evaluation.

Part of the decision to conduct an evaluation is based on feasibility—do we have adequate resources to gather, organize, and analyze the information that we need to answer the evaluation questions? Assuming that the answer is "yes," someone in the program has likely been designated to decide on appropriate instruments, prepare those instruments, distribute or administer them, and monitor the collection process. If the answer is "no," it may be time to reevaluate and think about how to allocate limited resources to focus on the most important evaluation needs. Chapter 2 helped programs think about evaluation needs. This chapter is designed to help programs focus energies and efforts on gathering useful information.

Components of Data Collection

The first step in data collection is to consult the Evaluation Planning Form (Logic Model) to see what new evidence needs to be collected. From the example in Chapter 2, we see that the two evidence columns in the International University Evaluation Planning Form require that 1) the program set up a record keeping system to track program accomplishments and then 2) create a number of survey forms to assess activity quality and the achievement of program outcomes. Additionally, underlying the Evaluation Planning Form, is an information system that the program needs to keep up with efficient program implementation (e.g., requests from teachers, school names, presenter availability, etc.). Each K-12 International presenter program will need to think through these aspects of data collection.

International University Evaluation Planning Form Data Collection Needs

MONITORING ACTIVITIES	EVALUATING OUTCOMES
Evidence of Activities & Quality	**Evidence of Results**
• Database of school visits for the year • Student feedback forms • Teacher feedback forms	• Database of school visits • Previous year's Accomplishment Report • Results of student, teacher, & presenter feedback forms
• Recruitment flyers, posters, & emails on campus • Database of school visits by presenters • Presentation evaluation forms that program staff and peers complete during rehearsals • Presenter self-evaluation/feedback forms	• Results of program staff, peer, presenter, and teacher feedback forms • Results of program participants' focus group
• Agendas for weekly seminars • Advertisements for international student presentations sent to schools and teachers • Presenter self-evaluation/feedback forms • Notes from post-visit seminar discussions	• Results from presenter and student feedback forms • Tallies of references (within & outside seminars) to community involvement
• Copies of materials provided to teachers • Database records of requests for presenters or information	• Results from teacher feedback forms • Summaries from teacher focus groups

Record Keeping for Program Management & Monitoring Evidence

All programs need to keep track of information that is important to program implementation and monitoring. Which schools have requested presentations? What types of presentations have been requested? When are presenters available? How many people were served? Number of presentations conducted? Number of teachers attending professional development workshops? Number of culture kits requested? These are all questions of interest to the program, which require some record keeping. Some of the information (implementation tracking data) is related to efficient program operation (e.g., keeping up with school requests, names, addresses, etc.). Other types of information (monitoring data) are kept to describe and report the program services provided (e.g., number of presentations completed this year, number of teachers trained). In terms of data collection, both of these purposes usually are served by the same data collection system.

All programs need to keep track of information that is important to program implementation and monitoring.

This data collection system can be kept with hand-written files and notes, or program staff members can use computer programs to assist with this activity. The size of your program (e.g., the numbers of presentations per year, the number of teachers trained, the number of kits distributed, etc.) will influence the type of record keeping strategy selected as well as the type of surveys used. For example, a medium-sized program may be able to manage well with a database created in Microsoft© Excel (Excel) to keep track of requests, presenters, presentations, etc. A larger program might better accomplish this through a more powerful database like Microsoft© Access (Access).

Collecting Information to Assess Activity Quality & Program Outcomes

The remaining data collection activity for the planned program evaluation requires that program staff members determine the quality of the program activities for monitoring purposes as well as the level of outcome attainment. To do this, they might used existing assessments (e.g., previous surveys used, standardized test scores, grades, interest inventories, etc.) or they might have to create surveys to meet their evaluation needs. Once again the size of the program will guide how this is done. A program that completes 10 presentations per year will probably want all teachers to fill out a presentation feedback form; whereas a program providing 300 presentations might use a sample of teachers or ask that all teachers complete a survey with machine-scoreable responses.

Data Collection Options

The chart below lists the most common data collection options used in program evaluation (see Figure 3.1), including examples, key advantages, and limitations for each. For example, databases (in Microsoft© Excel and Access) are useful for tracking monitoring evidence. Surveys are used to assess opinions.

The Evaluation Tool Kit contains examples of these instruments. The use of databases is covered in Part I of this chapter, while Part II of this chapter describes the Survey Generator function of the Tool Kit that allows programs to design different Opinion Surveys, as well as Attitude & Interest Surveys. The tools included in the Evaluation Tool Kit and elaborated in this Evaluation Manual are shaded in gray in the table below. Though most K-12 International Outreach Programs will not use knowledge tests, they are described here because partners (e.g. teachers) may be interested in collecting such data.

The Tool Kit resources were designed by EvAP, the Center for Global Initiatives, and partner K-12 International Outreach Programs to help with the collection of program implementation tracking along with monitoring and outcome evidence. The resources of the Evaluation Tool Kit are accessed through the Center for Global Initiatives website (http://gi.unc.edu/) under **Evaluation Tool Kit** (http://gi.unc.edu/k12toolkit).

Data Collection Options

Data Collection Strategy	Examples	Key Advantages	Limitations
Databases:	Excel, Access, files, web-based databases	Tracks monitoring evidence	
Knowledge tests:		Assess content knowledge	
Limited response	Multiple Choice, True-False	Can cover large amount of content domain	Difficult to assess higher order cognitive skills
Open-ended	Essays, Short Answer	Can assess higher order cognitive skills	Limited amount of content coverage
Performance Assessment	Drivers License Test	Can assess actual behaviors	Resource intensive Limited amount of content coverage
Opinion Surveys:		Assess opinions	
Written:		Written record of responses	Need literate respondents
On-Site		Usually good response rates	Miss those not in attendance
Mail		Can contact people from different geographic areas	Poor response rates
Email		Ease of survey distribution	Respondents must have email
Web-Based		Ease of survey distribution and data summary	Respondents must be able to use the internet
Telephone		Can contact people from different geographic areas	Questions need to be easy to answer People reluctant to participate
Group	Focus Group	Cost effective Can assess degree of consensus	Limited number of participants in groups
Face-to-Face	Interviews	Can probe for more detail Respondents can ask questions	Resource intensive
Attitude & Interest Surveys:	Likert Scales Semantic Differential	Assess degree of attitude or interest Easy to score	Little in-depth probing possible
Checklist	Rubrics Program Audit	Lots of Coverage	Limited depth of response

Figure 3.1 Guide to Instrument Selection (O'Sullivan, 2004, pp. 92-97)

Tool Kit Contents

How the Tool Kit Is Organized

The contents of the Evaluation Tool Kit are presented below in Figure 3.2. Section I of the Tool Kit is comprised of data management tools for program management, tracking, and monitoring. Included are tools for managing typical program functions (e.g., requests for speakers, scheduling of presentations, numbers of presentations conducted, contact information for presenters and schools, etc.). Though the examples shared in this chapter may not "fit" each program's specific needs, they will, hopefully, provide ideas on efficient and effective management. Like other samples in the Evaluation Tool Kit, these management tools can be used "as is" or modified to address unique needs.

Section II of the Tool Kit contains sample items for programs to use in assessing stakeholder perspectives about program activities or outcome attainment. More information about using these sample items to construct quality instruments will be included in Part II of this chapter. As an overview, the Tool Kit Survey Generator is organized by key program stakeholders: Early Elementary Students, Elementary Students, Secondary Students, Presenters, and Teachers. In addition, programs can use the Survey Generator to create evaluations for professional development workshops, as well as focus group interview protocols.

K-12 International Outreach Program: Evaluation Toolkit Contents		
Section	**Focus**	**Interface**
I.	**Managing Program Activities** ○ Requests ○ Scheduling/Monitoring (schools, groups, dates, participants, etc.)	Excel, Access, Tables…
II.	**Assessing Stakeholder Perspectives** **A.** Early Elementary Students **B.** Elementary Students **C.** Secondary Students **D.** Presenter **E.** Teacher **F.** Professional Development **G.** Focus Group Protocol	Survey Generator

Figure 3.2 Evaluation Tool Kit Contents

PART I:
COLLECTING MANAGEMENT and MONITORING EVIDENCE

As explained in Chapter 2, monitoring evidence provides information on program activities. There are three management options available to help users manage programs and collect monitoring evidence: written or compiled lists of program activities, spreadsheets, and databases. The Tool Kit contains templates of an Excel spreadsheet and an Access database.

The selection of a particular tool, or the development of an alternative one, depends on several variables. Among the most important are the size of the program, the number of instruments to be distributed and collected, and program resources.

Written Lists & Compiled Evidence

A small K-12 International Outreach Program with 15-20 requests for presentations per year may manage with a simple paper and pencil chart or list created by program personnel. That chart would likely include much of the same information listed on the spreadsheet examples below. The example here (Table 3.1) is of a table for tracking presentations created using the table option in Microsoft© Word.

Table 3.1: Table of Presentations

Date	Presenter Name	Gender	Presentation Topic	Location	Grade	Audience Size
12/3/05	Quach, Sun	F	Asian Holidays	Smith Elementary	2nd	30
1/17/06	Echeverria, Margarita	F	Flora & Fauna of Central America	Fair Hope Middle	7th	45

The program also might compile forms in folders to keep track of events. For example, if teachers complete a request form, then that form will be put into the "Requests" file. When there are few activities, this option is probably the simplest.

Excel Spreadsheets

Even with a small amount of management information to track, the computer based Tool Kit examples may be worth the effort required to enter the data. Because spreadsheets and databases can easily sort and organize the information, they may save time and resources in the longer term.

The Tool Kit provides spreadsheet templates created using Microsoft© Excel for managing general program functions. For instance, programs coordinating 50 - 100 presentations may choose an Excel spreadsheet as a useful way to "manage" lists of presenters, teacher requests, presentations, schedules, etc. A spreadsheet is a relatively easy method for managing modestly sized programs.

A spreadsheet is always organized into columns and rows. Each column is for a particular type of data (First name, last name, address, affiliation, etc.). Each row is for a particular item, event, or person (Presentation #__, Dr. Jane Smith, North Middle School, etc.)

> Because spreadsheets and databases can easily sort and organize the information, they may save time and resources in the longer term.

In addition, each spreadsheet (or Workbook) may include several worksheets. By default, Excel creates a Workbook with three worksheets. Workbook tabs appear at the bottom of each page of a spreadsheet. Users can click those tabs to move from one worksheet to another.

The Tool Kit includes examples of five worksheets that offer a means of managing requests for Schools, Requestors, Requests, Presenters, and Presentations. Figure 3.3 below shows the first worksheet users see when opening the K-12 Presenter Spreadsheet in the Tool Kit. Viewing the tab at the bottom of the page indicates that this worksheet is for Schools. Users can select a different worksheet by navigating the tabs at the bottom of the screen, moving from Schools, to Requestors, to Requests, to Presenters, to Presentations. Programs can use these spreadsheets "as is," or customize the worksheets to record necessary information.

Template worksheets with mock data for Schools, Requestors, Requests, Presenters, and Presentations are shown below. The Schools worksheet (Figure 3.3), logs the school name, school district, grade levels, address, phone and fax number, web address, and directions.

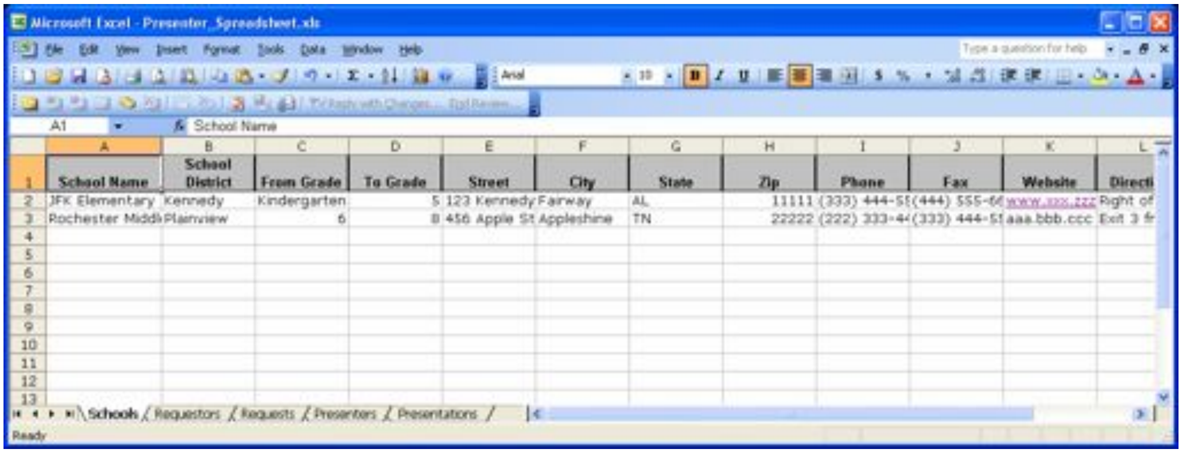


Figure 3.3: Worksheet for Schools

The Requestors worksheet in Figure 3.4, logs the Requestor's name, title, grade level, subject area, contact information, and notes.

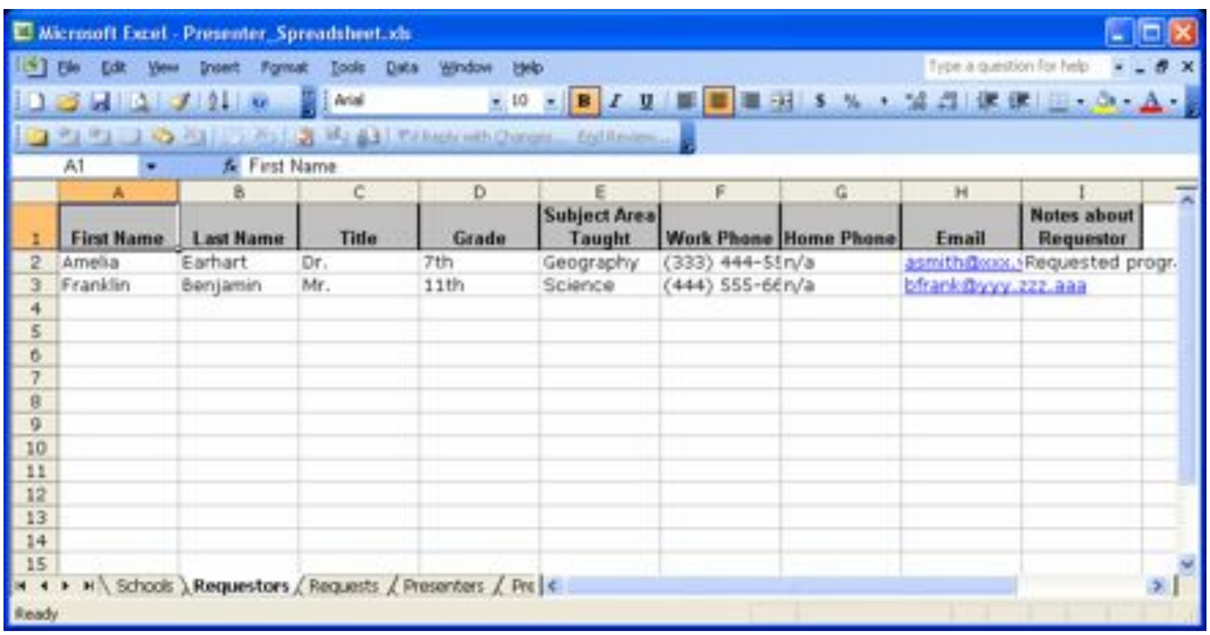


Figure 3.4: Worksheet for Requestors

The Requests worksheet (Figure 3.5) logs the request text, the requested date and time, the scheduled time, and the requestor's name.

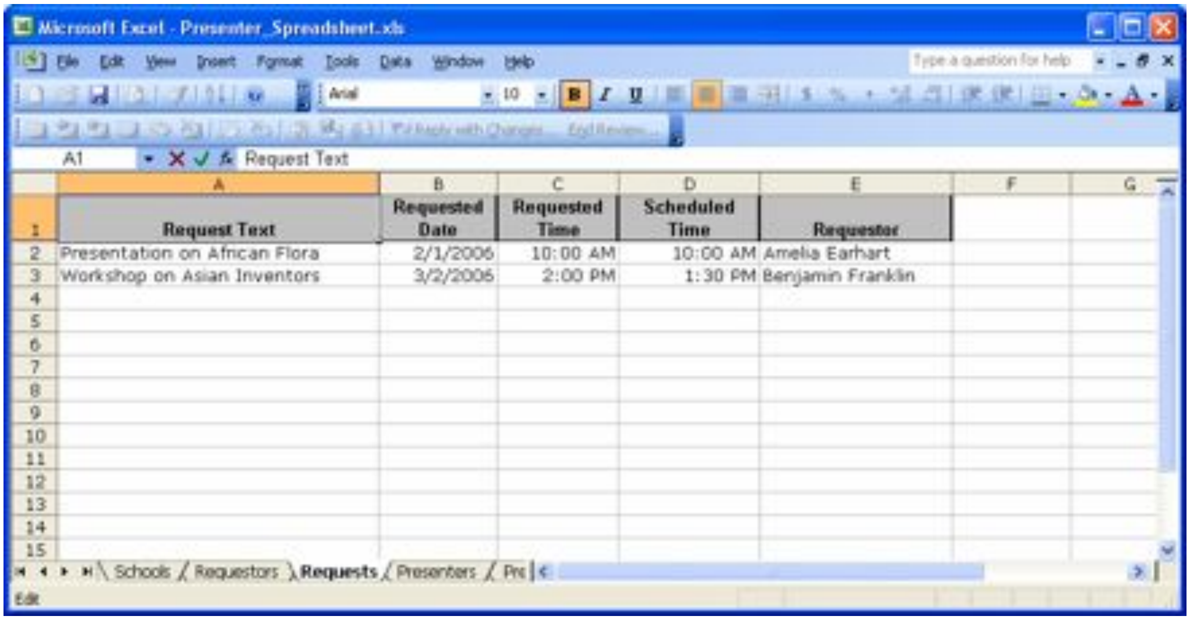


Figure 3.5: Worksheet for Requests

Figure 3.6 shows an example of the Presenters worksheet. As shown below, fields include the presenter's name, the title of the presentation they offer, their address, contact phone numbers, and availability.

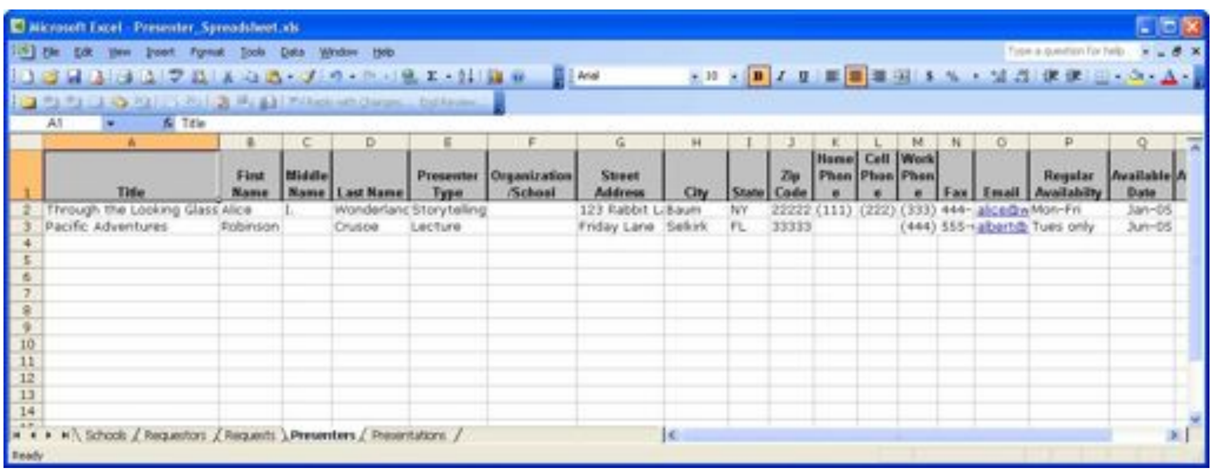
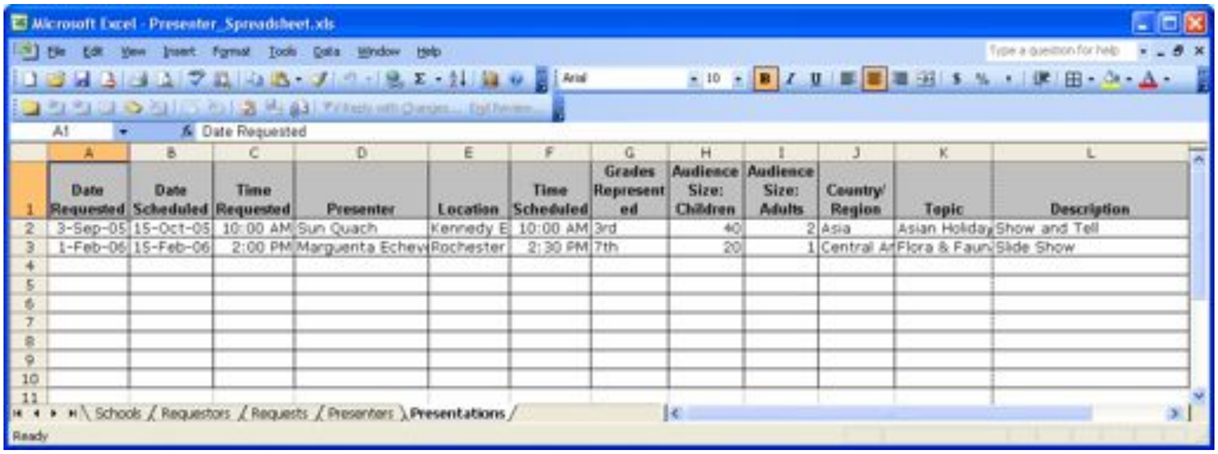


Figure 3.6: Worksheet for Presenters

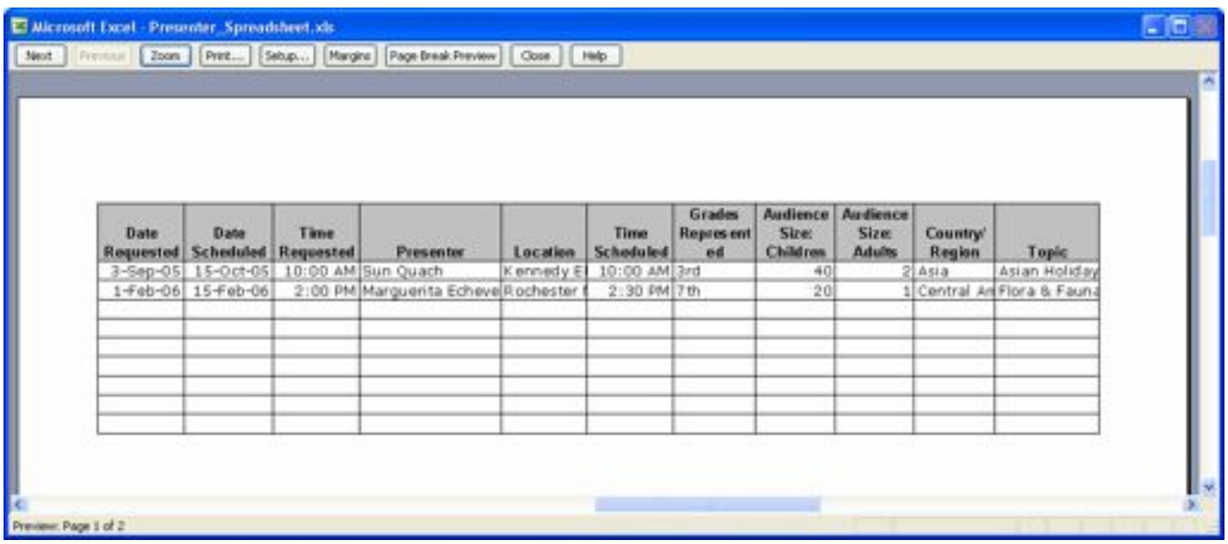
Finally, the Presentations worksheet (Figure 3.7) tracks request information (date and time requested, date scheduled), the presenter's name, the location of the presentation, the date and time of the presentation, audience grade level(s), audience size for children and/or adults, county, presentation topic, and a description of the presentation.



Date Requested	Date Scheduled	Time Requested	Presenter	Location	Time Scheduled	Grades Represented	Audience Size: Children	Audience Size: Adults	Country/ Region	Topic	Description
3-Sep-05	15-Oct-05	10:00 AM	Sun Quach	Kennedy E	10:00 AM	3rd	40	2	Asia	Asian Holiday	Show and Tell
1-Feb-06	15-Feb-06	2:00 PM	Marguerita Echev	Rochester	2:30 PM	7th	20	1	Central Ar	Flora & Faun	Slide Show

Figure 3.7: Excel worksheet for Presentations

Figure 3.8 below, shows how the first page of the Presentation spreadsheet would look when printed out.



Date Requested	Date Scheduled	Time Requested	Presenter	Location	Time Scheduled	Grades Represented	Audience Size: Children	Audience Size: Adults	Country/ Region	Topic
3-Sep-05	15-Oct-05	10:00 AM	Sun Quach	Kennedy E	10:00 AM	3rd	40	2	Asia	Asian Holiday
1-Feb-06	15-Feb-06	2:00 PM	Marguerita Echeve	Rochester	2:30 PM	7th	20	1	Central An	Flora & Fauna

Figure 3.8: Excel Printout of Presentations

Reviewing these worksheets, it is easy to see how programs can manage information related to the activities of a K-12 International Outreach Programs. Entering information into the various Excel worksheets, program staff can keep track of information critical for program management.

Again, it is important to remember that these worksheets are samples or prototypes. Program users can add, modify, or delete fields on each worksheet to meet the needs of their particular program. They also may create new worksheets as needed.

Access Database

In larger programs or programs that wish to collaborate across multiple sites, it may be appropriate to use a more sophisticated data management program, such as an Access database. Microsoft© Access (Access) is available as part of the Microsoft© OFFICE suite of programs for PCs (not Macintosh) and is very compatible with both Microsoft© Word and Excel. If the program manages more than 100 presentations per year, that larger database may be more appropriate for administrative tasks than Excel. The Access database that is part of the Evaluation Tool Kit requires that users have Microsoft Access on their computers before it can be downloaded from the Center for Global Initiatives website by choosing the Evaluation Tool Kit link (http://gi.unc.edu/k12toolkit).

> In larger programs or programs that wish to collaborate across multiple sites, it may be appropriate to use a more sophisticated data management program,

This Access database was originally created to assist with the administrative and evaluation tasks in a large K-12 International Outreach Program. It has been modified in the Evaluation Tool Kit to adapt to larger number of activities (i.e. more than 100). Thus, compared to the Excel worksheets described earlier, Access table headings of Requestors, Presenters, and Presentations are the same, but now the Requests worksheet has been transformed into a Schools table to accommodate the expected larger number of schools. Remember this Access database may not be necessary for small- to mid-sized programs, in which case the Excel Spreadsheets above may be a more appropriate choice or the hand written/ compiling options discussed earlier.

After downloading the Access database from the Center for Global Initiatives website, users will see tabs for four data collection options in the database (Schools, Requestors, Presenters, and Presentations), along with one Reports tab. The Schools, Requestors, Presenters, and Presentations tabs will be reviewed in this section on data management. The Reports tab will be discussed in Chapter 4 as part of a discussion of summarizing data.

Figure 3.9 depicts the Schools tab, below, which is the first tab users see when opening the database. This page allows programs to record a variety of information about the schools they work with in their outreach efforts. Using Access, each school will have its own "page."

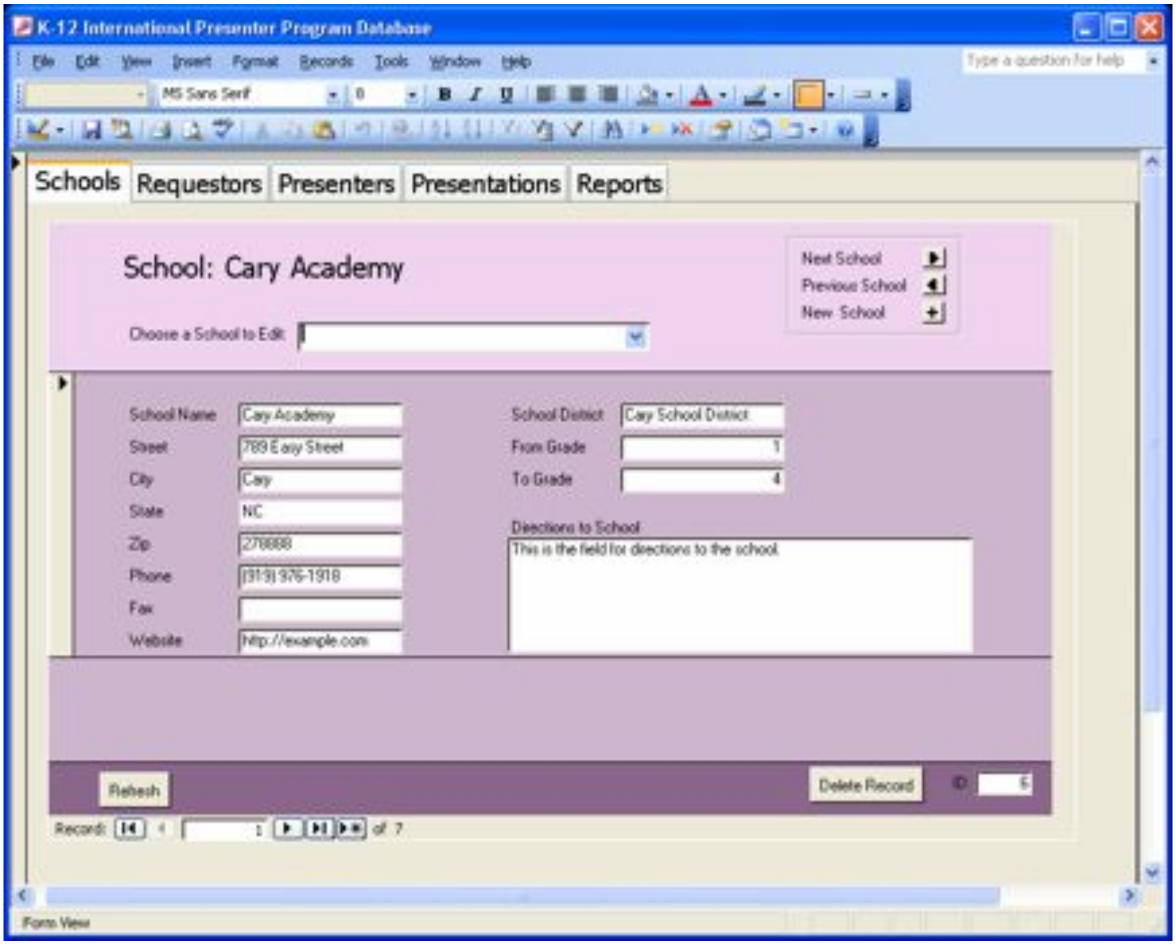


Figure 3.9: Schools tab in Access database

The Requestors tab (Figure 3.10) is depicted below. Similar to the Schools table, each requestor will have his or her own sheet. This tab allows programs to keep track of requests made by school staff, including teachers, counselors, or administrators. Reviewing this page shows that tabs in the Access database are cross-referenced. On this page, for example, note that the School Name window has a pull-down window populated by the schools entered on the Schools tab. Before entering a new teacher, from a new school, it will first be necessary to enter the school's information on the Schools tab.

The gray box at the bottom of the Requestor's page allows program staff to record multiple requests from one presenter, and to keep track of the status of requests (e.g., Contacted Presenter, Confirmed, Cancelled, etc).

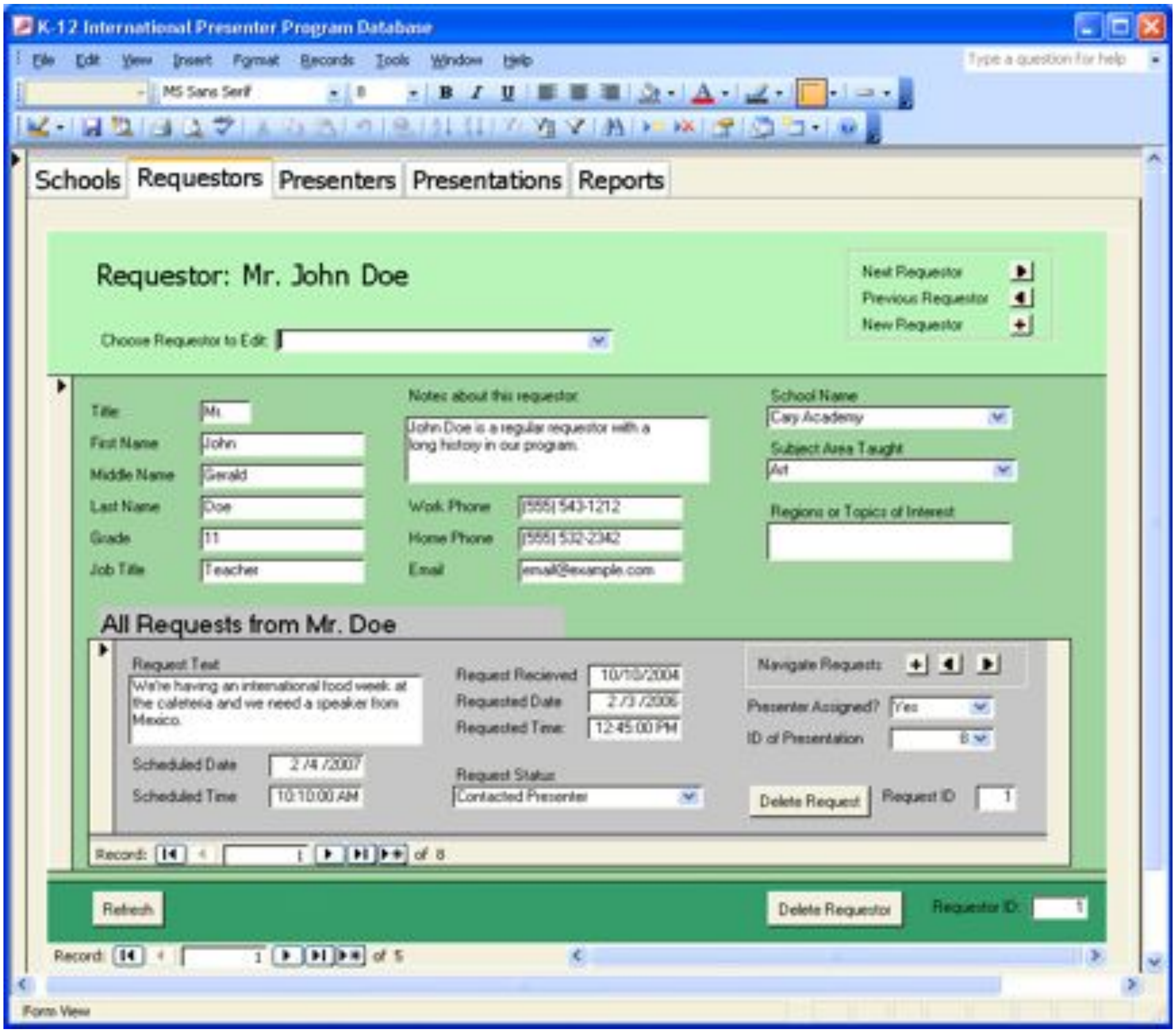


Figure 3.10: Requestors tab in Access database

Figure 3.11, below, shows the Presenters tab in the Access database. This page records data on individual presenters, including contact information, availability, and the topics about which they make presentations.

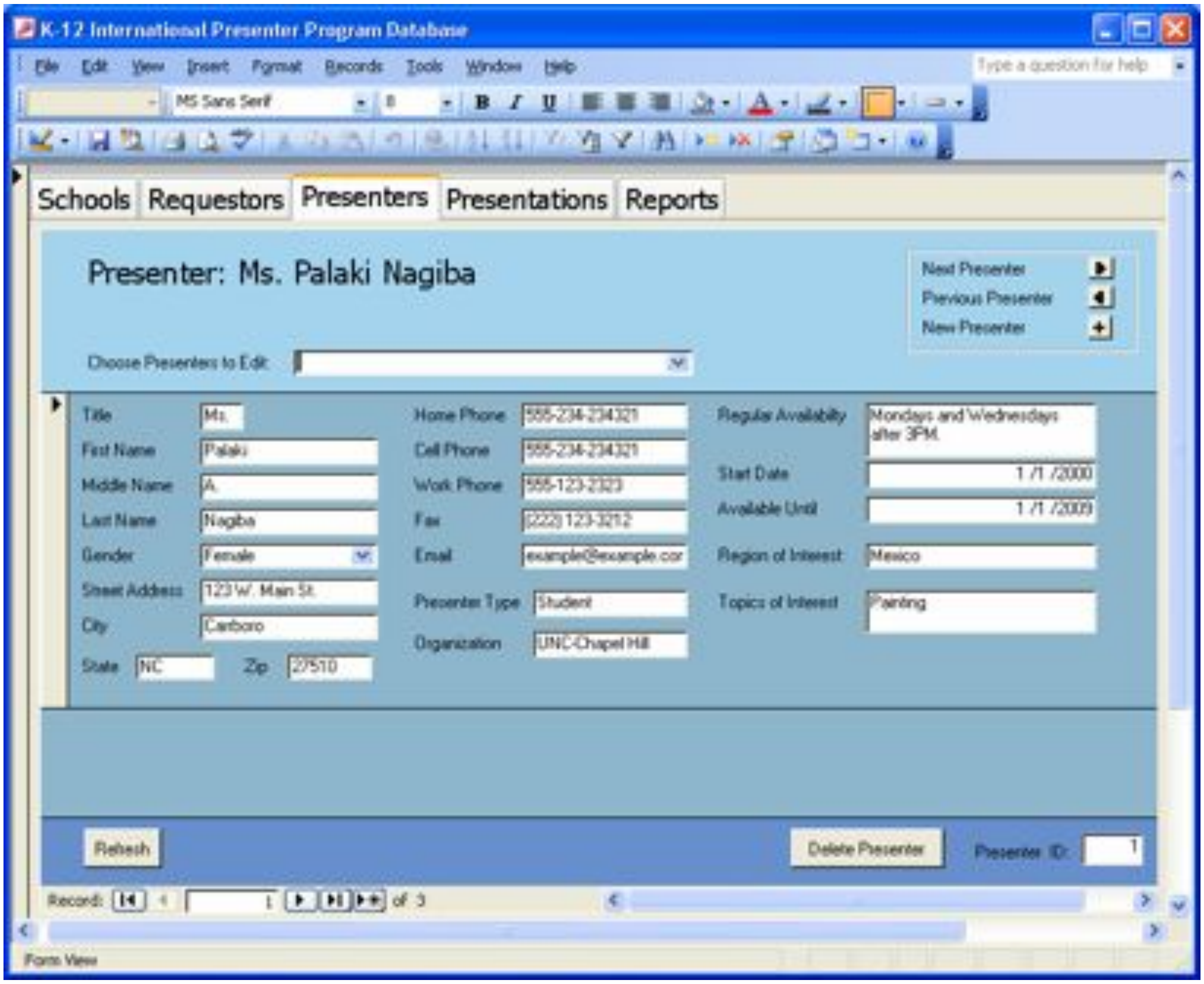


Figure 3.11: Presenters tab in Access database

The final data management tab in the Access database is for Presentations (Figure 3.12). This page allows program staff members to keep track of confirmed presentations. Pull-down windows beside School Name, Requestor, and Presenter allow those people entering information to select information previously entered on other pages. In this tab, program staff also can search the database to view programs scheduled by County/Region, for example, or by other relevant categories.

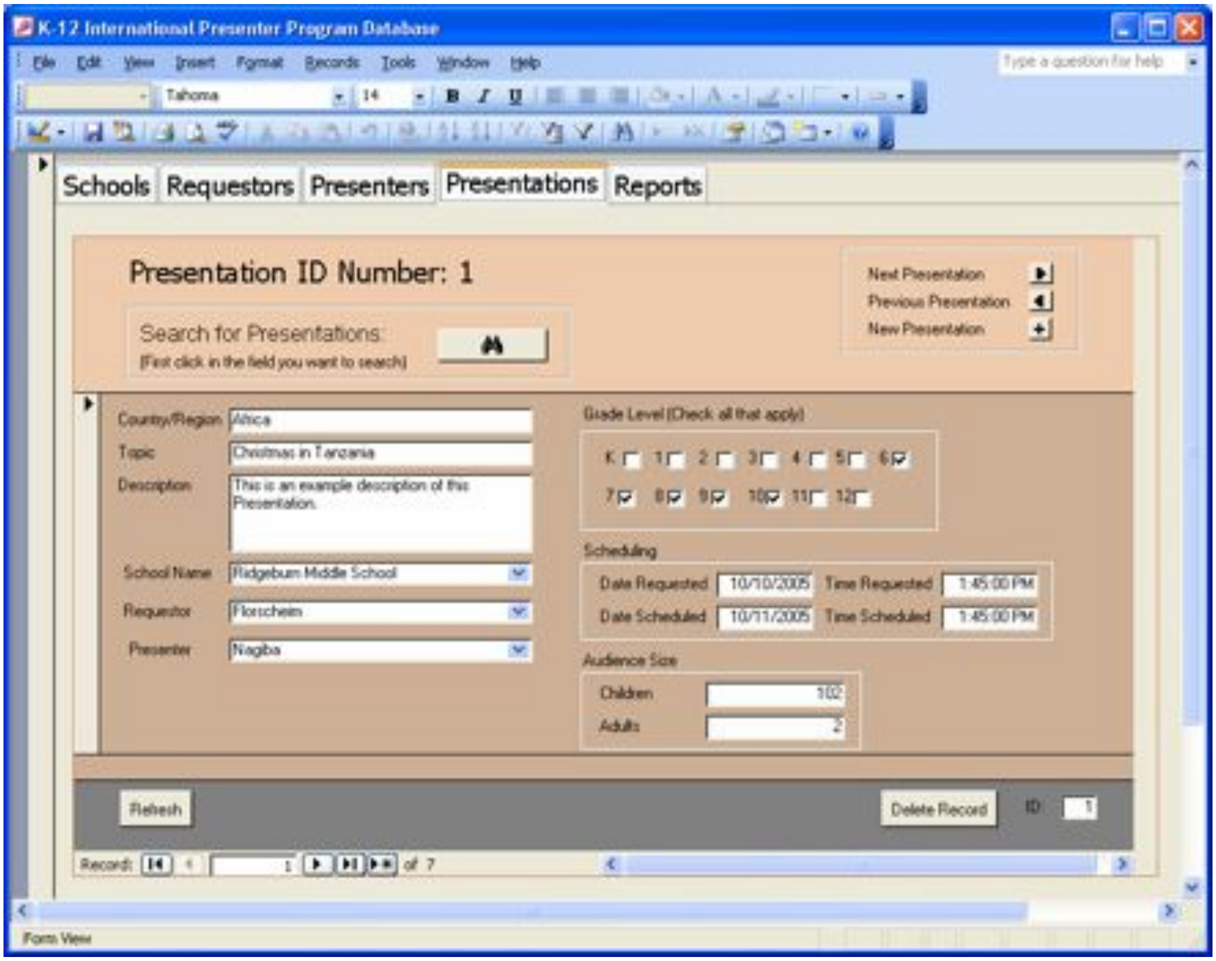


Figure 3.12: Presentations tab on Access database

Please note that for all data entry, it is important to refresh the database after entering or revising information on different tabs.

As a data management tool, the Access database allows program staff to keep track of a large amount of information. This section has demonstrated how program staff can use simple tables, Excel spreadsheets or the Access database as tools for managing the activities of a K-12 International Outreach Program and for collecting evidence to monitor the program.

Using the Database to Improve Program Implementation

It is possible and useful to use the record keeping system selected to track program accomplishments and improve program operations. This kind of data collection can be used to identify possible areas for improvement in program operation. For instance, if there are 5000 teachers in the program's service area and only 50 of those requested a speaker during the year, what might that suggest?

Could it be a matter of communications or community relations? Do teachers simply not know about program services? Could it be political - a shift in the district's priorities? Could a decline in requests from one year to the next suggest issues of program quality or relevance? Tracking program management and monitoring information cannot *directly* answer any of these questions. However, such data collection might well suggest questions that are worth pursuing using other means.

The record keeping system might also be used to see if the program is, in fact, doing what it is charged to do. If the charge is to provide a speakers' bureau, are incoming requests responded to in a timely manner? If it is to provide teacher professional development, are those sessions conducted and well attended? These examples demonstrate that there is value in reviewing program events collected through the record keeping systems to improve program operations.

With a plan in place for how to manage program information in general and data collection in particular, users are ready to make choices about what data to collect.

The tools described thus far (i.e., tables, spreadsheets, databases) are good examples of record keeping strategies for collecting management and monitoring information. Chapter 4 will demonstrate how these tools also may contribute to collecting data about outcomes.

With a plan in place for how to manage program information in general and data collection in particular, users are ready to make choices about what data to collect. At a broad level, there are two choices—whether to gather information about the quality of the program activities and/or the achievement of outcomes. Again, this decision goes back to the logic model and evaluation plan.

The Took Kit examples included in Part I can be used to create a record keeping system to gather information about program implementation and activities. Many evaluation questions focused on monitoring program activities can be answered with this information. Part II will discuss the collection of data about the quality of program activities and their *outcomes*. It will include how to ensure that the data collected are valid and reliable. It also will demonstrate how to develop quality instruments either based on Tool Kit samples or developed by the program.

PART II:
ACTIVITY QUALITY and OUTCOME DATA COLLECTION

Part I demonstrated how the program management tools might be used to both manage program information and review that information to improve program quality. Such process information is critical to demonstrating that the K-12 International Outreach Program engaged in activities designed to meet goals and objectives.

For evaluation purposes, however, most programs should choose to ask questions beyond how many services were provided and explore the quality of those services and ultimately the achievement of the program outcomes that the activities were expected to affect. They will typically want to know something beyond the facts that speakers made presentations. Moreover, they will likely seek evidence that the program's outcome goals have been accomplished.

Data come in different shapes and sizes. In evaluation terminology, an important distinction is between quantitative and qualitative data collection. It is important to collect both kinds of data as part of a quality evaluation, though stakeholders may have different opinions about their relative worth. Before making decisions about data collection strategies, some discussion about this important distinction is warranted. Quantitative and qualitative data collection methods are described below.

Quantitative or Qualitative Data Collection

As the word suggests, quantitative data "counts" things. With quantitative data, programs can "measure" all kinds of program outcomes in numbers. Were more presentations made at elementary or secondary schools? Did more requests for speakers come from particular schools than from others? Were the teachers satisfied with the quality of presentations? Did students report greater cultural awareness after presentations?

Quantitative data can report words as well as numbers. If a survey, for instance, asks an open-ended question about why students liked a particular presentation, the responses can be tallied. The evaluator can report that 15 of 25 students mentioned the artifacts that the speaker brought to share and 8 of 25 liked the slides.

Qualitative data provide more in-depth answers to questions and begin to tell the stories that lie behind the numbers.

On the other hand, the evaluator who wants to probe beyond the numbers must collect qualitative data. Qualitative data provide more in-depth answers to questions and begin to tell the stories that lie behind the numbers. For instance, to understand why Speaker A is much better received than Speaker B may require qualitative data gathering.

With quantitative data, breadth is possible. It is possible to collect and manage information from large numbers of participants. With qualitative data, it is possible to achieve a deeper understanding of what those numbers mean, but because qualitative data are more resource intensive to collect and summarize, fewer people are usually measured. Another way to draw the distinction is to think in terms of representativeness vs. richness (O'Sullivan, 2004). With quantitative data, programs can collect data from a larger, more representative group of respondents. With qualitative data, the numbers may be smaller, but there will almost certainly be greater richness.

As with other aspects of evaluation, the decision comes down to a question of needs and resources. If the program decides to collect data from large numbers of people or to ask lots of questions, then quantitative data collection may be the only reasonable option. On the other hand, if depth of understanding is important, the program may decide to invest the people resources necessary to probe for the stories behind the answers.

Finally, "both" is a good answer to which kind of data to collect. Depending on the evaluation question, the collection of both quantitative and qualitative data may provide both a sense of scope and a deeper understanding.

Guide to Good Data Collection

Once a program has established the need(s) for an evaluation and decided to commit the resources necessary to conduct it, the quality of the data collected becomes paramount. Quality data collection is necessary to make good decisions about program improvement. Two aspects that affect quality are: 1) instrument validity and reliability and 2) sampling decisions.

Instrument Validity and Reliability

> Validity is the extent to which an instrument is appropriate to its purpose.

Simply, validity is the extent to which an instrument is appropriate to its purpose. Does it measure what the program needs it to measure? The instruments included in the Tool Kit have been validated with K-12 International Presenter Programs but may or may not be valid for another program's purposes. If a program's data collection purpose matches the items in the Tool Kit, then they can be used with confidence. If the items fit the evidence required in the Evaluation Planning Form, then the instrument would be considered valid.

> Reliability is the extent to which an instrument elicits consistent responses.

Reliability, again simply put, is the extent to which an instrument elicits consistent responses. If the same measure were used again immediately, would the results be the same? For K-12 International Outreach Program purposes, reliability can be established by having a group or an "expert" review the instrument to make sure that the directions, language, format, and content are clear. The items in the Tool Kit have been tested for their reliability with the audiences identified. If an audience is substantively different from the ones listed in the Tool Kit, then the instrument needs to have its reliability checked

Good Instrument Development Practices

In addition to using items already developed in the Tool Kit, programs might choose to develop instruments or protocols for other purposes. Should this be the case, the program must establish the validity and reliability of the newly created assessments to make sure they will yield information appropriate to the evaluation. Programs can use The Guide to Good Instrument Selection in Figure 3.1 at the beginning of this chapter, which presents an overview of various types of instruments, to select the type of instrument they want to construct. Then, if they are using written questionnaires, focus groups, or interviews, they and can use the Guide to Good Instrument Development below in Table 3.2 to assist them in this activity.

The very first questions to be asked relate to choice of instruments (see A below). Responses to these questions will help program personnel decide if they need to create a database or craft an opinion survey. Section B below guides program personnel through questions designed to assess the merits of various written questionnaires or interview protocols. Once an instrument has been chosen, Section C guides program staff through the process of pilot testing the instrument.

Table 3.2: Good Instrument Development Practices (O'Sullivan, 2004, pp. 97-100)

Good Instrument Development Practices

A. Instrument Choices:

1. What type(s) of information do you need to collect?
2. Who will be asked to provide the information?
3. What resources are available to collect the information?

B. Quality Written Questionnaires, Focus Group Questions & Interview Protocols:

1. Is the purpose of the instrument clear?
2. Are the directions clear?
3. Is the format inviting?
4. Does it allow for ease of response?
5. Is there enough space for responses?
6. Is the length respectful of respondents' time?
7. Is the information organized to ease data summary?
8. Are questions numbered?
9. Can it be machine scored?
10. Are limited response items used when appropriate?
11. Have you asked, "Is there anything else I need to know or that you would like to share with me?"
12. Have you thanked participants for responding to the questionnaire?

C. Pilot Testing Steps:

1. Did you use your logic model to develop the questions?
2. Has someone else reviewed the questionnaire or protocol to make sure you've asked the questions that need asking?
3. Have questions with multiple meanings been removed?
4. Is the language appropriate to the audience?
5. Has a group, similar to your selected group, tried to complete it?
6. Will the pilot test data answer the questions of interest?

Sampling

Another aspect that affects the quality of data collection is how much information is collected and from whom. The answer to these questions depends on goals, needs, size, and resources. There is no absolute "right" answer, though 10% is often considered a reasonable sample size for evaluation purposes. That, of course, depends on the numbers of possible respondents and the type of instrument.

For instance, for a written questionnaire, if you have 200 teachers, a sample of 20 would probably be representative of the group. On the other hand, if you have 20 teachers, a sample of 2 would not work; rather, the questionnaire would be given to all 20. In a focus group, however, 6 teachers might well represent the 20.

Deciding on sample size can be rather complicated and involved (see, for instance, Jaeger, 1984). For K-12 International Outreach Programs, though, the bottom line is to select a sample that is large enough and representative enough to provide sufficient information to answer the evaluation questions.

Deciding on sample size can be rather complicated and involved.

Two sampling options may be relevant for most K-12 International Outreach Program purposes. The first is random sampling. Randomizing the selection process provides the best chance of choosing a smaller group that is representative of the whole. For instance, with that group of 200 teachers, the evaluator would create a list of the 200, choose a random place to start, and then select every 10^{th} name.

Stratified random sampling also may be relevant and useful. To ensure representativeness, the evaluator may want to divide the group into smaller sub-groups. For instance, if that same group of 200 teachers represented four different districts, the better choice would be to create four lists by district and then repeat the random sampling process for each list. There are many other purposive sampling options available (see, for example, Gall, Gall, and Borg, 2003).

With qualitative data collection, purposive sampling is typically necessary. Prior to selecting people for an interview or focus group, program staff members need to think through what information is needed. Focus groups of teachers might, for instance, be selected to represent different grade levels, school districts, geographic areas, experience with the program, or other possibilities. Likely the focus group might select those teachers who had used the program multiple times rather than those who had just used it once. For interviews, it might make the most sense to interview those teachers at those schools who do not participate in the program to find out how the program might expand services.

Challenges of Data Collection

In spite of the most careful planning, programs will likely confront challenges when collecting data. Some challenges can be addressed at the outset: Do I have enough surveys and sharpened pencils for the students who will complete evaluations at the end of the presentation? Did I remind the presenter to allow enough time at the end of the meeting for presenters to complete the opinion surveys?

> In spite of the most careful planning, programs will likely confront challenges when collecting data.

Other issues are more difficult to plan for, but may still be addressed. A common issue is that survey response rates may be lower than anticipated. When confronted with this challenge, programs still have recourse. Is it possible to distribute surveys during a face-to-face meeting? Have reminders been sent to survey recipients? Are there adequate resources to send postage-paid return envelopes with surveys?

Any challenge will have a variety of possible solutions. Careful planning may prevent some challenges; others can be addressed as they arise. The Resources Appendix of this manual includes resources that programs may find useful for troubleshooting issues related to data collection.

Tool Kit Item Development and Validation

The sample instruments included in the Evaluation Tool Kit are valid and reliable and can be used with confidence for data collection. The instruments were developed by Evaluation, Assessment, and Policy Connections (EvAP), located within the School of Education at the University of North Carolina at Chapel Hill (see http://www.unc.edu/depts/ed/evap for more information).

To develop the instruments, EvAP staff worked collaboratively with others who have expertise and/or interest in the development of a high quality and useful Tool Kit. Both the surveys and protocols included in the Tool Kit have been carefully crafted, pilot tested, and revised to ensure that they are both valid and reliable with the audiences indicated. K-12 International Outreach Programs may use them with confidence, trusting that they will yield high quality data.

Key stakeholders involved in development of the instruments included the Center for Global Initiatives staff members, Center for Global Initiatives partners in North Carolina, and national Center for Global Initiatives partners. Project staff members collaborated to develop instruments that would address the needs of K-12 International Outreach Programs. EvAP staff members also visited NC partner sites to develop better understanding of program needs and to give partners the opportunity to offer input. Expansion to include national partners offered another level for pilot testing and input.

Look back at Table 3.2 (Good Instrument Development Practices). When designing instruments for K-12 International Outreach Programs, EvAP staff, project staff and partners worked together to provide answers to the questions under Section A, "Instrument Choices." Instruments were then developed to assess stakeholder (presenters, teachers, students, and program staff) perspectives. For each instrument, the questions in Section B of Table 3.2 were asked and answered. Once revised, the instruments were pilot tested (see Section C, Table 3.2) and then revised again.

> Both the quality and the utility of results depend on the use of high quality instruments to collect data.

Evaluation results are important to programs. Sometimes high-stakes decisions rest on those results. Will the program be continued or not? More frequently, programs can use the results to improve the program, to identify successful components as well as those that might be improved.

Both the quality and the utility of results, however, depend on the use of high quality instruments to collect data. The samples provided in the Tool Kit are of high quality. If they match particular program needs, they may be used "as is." If not, they can be modified or new ones can be developed. In those cases, it is important to follow the "Good Instrument Development Practices" exemplified in the samples.

Using the Tool Kit to Construct Instruments

At the beginning of this chapter, the contents for Section II of the Tool Kit are listed (Figure 3.2). Using that as a guide, programs can see what particular categories are included in the questionnaires for each stakeholder group (presenters, teachers, students, staff). As with the management tools, the evaluation instruments in the Survey Generator portion of the Tool Kit are designed for use "as is" or they can be modified as appropriate.

For presenters, teachers, and students, there are questionnaires that combine some limited response items (using a Likert-type scale) and some open-ended formats. Except for the Early Elementary School questionnaire, which is administered verbally by the teacher, the other samples are self-administered. Each of the questionnaires includes questions about demographics, the quality of the presentation, outcomes, and an "other" question. In addition, the presenter and teacher questionnaires ask questions about training and support, including teacher professional development. Finally, program staff can design a focus group protocol.

When beginning the Survey Generator, program staff will be asked what kind of survey they would like to design when they start the Survey Generator (see Figure 3.13).

Figure 3.13: Survey Generator Introductory Screen

As indicated in Figure 3.13, program staff can create surveys for Early Elementary Students, Elementary Students, Secondary Students, Presenters, and Teachers, as well as surveys regarding Professional Development and Focus Group protocols.

For example, selecting the Early Elementary Student option brings up the following screen (Figure 3.14 below). After entering the name of the program in the top window, staff can create a survey appropriate for early elementary students. As the figure shows, presenters can choose from a menu of possible questions. The “Item Text” of the questions is provided, along with the “Item Type.” In the sample below, the options are “Likert Scale” questions and “Open Ended” questions.

Figure 3.14: Early Elementary Student Survey Generator

Choosing each of the options in the window, staff can create the survey that follows.

Early Elementary Student Feedback Form

International University
August 2006

Directions for Teacher: Please ask your students the following questions to help us improve our program and provide better presentations to your students. Deliver the completed form to your presenter. For yes/no questions, record the number of students who choose the answer. For other questions, solicit and record 3 responses and the number of students who agree or disagree.

Name of Presenter(s):

Topic of Presentation:

Date: Number of Students:

Directions for Students: I am going to ask you some questions about today's presentation. Your answers will help (Name of Presenter) and other presenters give better talks to students. This is not a test. The right answer is the one that tells me what you think. When I ask you a question, please raise your hand only once to vote either yes or no.

	Number of students	
	Yes	No
1. Did you like the talk?		
2. Did you understand the talk?		

3. What was best about the talk?

4. What would make the talk better for students?

5. What did you learn from the talk?

6. Is there anything else you would like to say about today's talk?

Thank you for taking our survey!

In another example, when choosing "Presenter," the items available to construct a Presenter Feedback Form are shown below (see Figure 3.15). In the sample page shown below, all of the options are "Likert Scale" questions with responses ranging from Strongly Agree to Strongly Disagree.

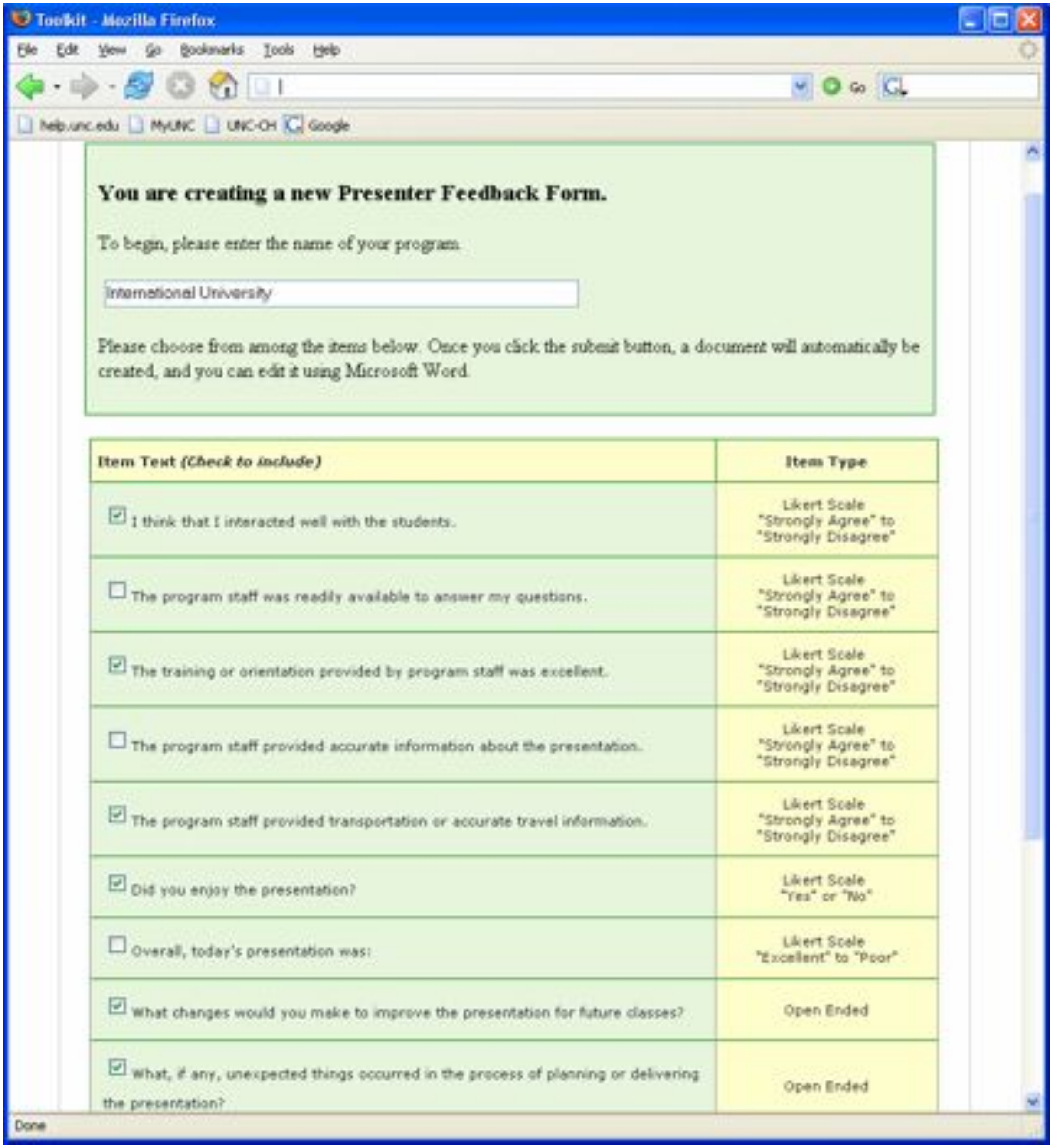


Figure 3.15: Presenter Feedback Form in Survey Generator

Choosing from the menu of options, the following Presenter Feedback Form can be created.

Presenter Feedback Form
Your International Outreach Program
June 2006

Please answer the following questions to help us improve our program and provide better presentations to students. Deliver the completed form to your presenter.

Name of Presenter(s):____

Topic of Presentation:_____________________ Date:_______________

	Yes	No
1. Did you enjoy the presentation?	O	O

2. What changes would you make to improve the presentation for future classes?

____

____

____

3. What, if any, unexpected things occurred in the process of planning or delivering the presentation?

____

____

____

	NA	Strongly Agree	Agree	Disagree	Strongly Disagree
4. I think that I interacted well with the students.	O	O	O	O	O
5. The training or orientation provided by program staff was excellent.	O	O	O	O	O
6. The program staff provided transportation or accurate travel information.	O	O	O	O	O

Thank you for taking our survey!

Thank you for taking our survey!

The Survey Generator allows for the creation of comparable forms for each stakeholder group. Because the Survey Generator "generates" the survey in MS Word, all of the surveys can be modified to meet particular program needs. Users for whom the sample instruments are relevant and appropriate may choose to use them as they are. However, because each program is unique, it is likely that some items will be relevant and appropriate and others not. Programs may, therefore, choose to delete some items and add others to make them more program-specific.

Modifications such as this should not change the fact that the items are valid and reliable. If, however, the program chooses to make significant additions or create new instruments, it is important to follow the Good Instrument Development Practices shown earlier in Table 3.2.

Summary

The Evaluation Planning Form/Logic Model (Chapter 2) shows the two different types of evaluation evidence typically collected: monitoring and outcome. Monitoring evidence is used to show that the K-12 International Outreach Program has conducted activities prescribed to meet goals and objectives. Outcome evidence is used to assess the extent to which outcomes were achieved. In addition to gathering monitoring and outcome evidence, programs need to develop an overall data management system that also will allow for the collection of information that assists program implementation.

This Chapter, in conjunction with the Tool Kit, has provided assistance in collecting all the information a program needs to conduct quality evaluation. Tools developed to help manage program activities can be used to assess program operations, summarize program activities, and determine the extent to which outcomes are achieved. To assist in collecting outcome data, appropriate items for instrument development were provided. With the information in this chapter, K-12 International Outreach Programs can construct instruments and collect outcome evidence from them.

Once collected, both monitoring and outcome evidence must be summarized. How to do that in ways that make the data useful to stakeholders will be covered in Chapter 4.

CHAPTER 4

Summarizing Data

In Chapter 2 of this Evaluation Manual, the planning required for a successful evaluation was described. Such planning ensures that the evaluation will serve the intended purposes and will remain focused. That focus helps the program avoid wasting resources by collecting evidence that is not directly related to the stated outcomes.

Chapter 3 suggested procedures for collecting and managing overall data collection, both the "monitoring" and "outcome" evidence required. The Evaluation Tool Kit, reviewed in Chapter 3, includes aids to support data collection with explanations and examples. Again, by creating and referring back to the Evaluation Planning Form/Logic Model (Chapter 2), K-12 International Outreach Programs can ensure that only evidence useful for the evaluation is collected. Unfortunately, too many programs waste human and fiscal resources collecting evidence that cannot be used.

Once the prescribed evidence is collected and organized, it must be summarized. Just having evidence is not enough. For example, a K-12 International Outreach Program may have a file of 200 Student Feedback Surveys. However, those 200 individual surveys are of little use sitting in the file. To make the evidence accessible to interested stakeholders, the information on those surveys must be compiled and summarized in a manner that conveys an accurate and clear picture of what the students have reported.

Chapter 4 will discuss ways to summarize both "monitoring" and "outcome" evidence so that it is useful to interested audiences. This is step 6 in the Evaluation Map.

1.	2.	3.	4.	5.	6.	7.	8.
Determine Program Goals & Objectives	Plan Program Activities	Identify Desired Outcomes	Choose Evaluation Tools	Collect Data	Summarize Data	Report Findings	Use findings to revise goals & objectives and improve program

A review of the sample Evaluation Planning Form for "International University" (Chapter 2) is a good place to begin. That form is repeated below:

			MONITORING ACTIVITIES	**EVALUATING OUTCOMES**
Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**	**Evidence of Results**
Enhance K-12 students' and teachers' understanding of different cultures	Provide cultural presentations at 30 schools per semester	• Increase cultural presentations to at least 400 students in the school district • 80% of students and teachers will report increased knowledge of international culture	• Database of school visits for the year • Student feedback forms • Teacher feedback forms	• Database of school visits • Previous Year's Accomplishment Report • Results of student, teacher, & presenter feedback forms
Improve international students' (presenters') English presentation skills	• Recruit international students to participate in the program • Conduct a weekly seminar where presenters plan presentations and practice English presentation skills	• 10 new international students will present in schools • Each presenter will rehearse presentations and receive feedback from program staff and peers before going into schools • 80% of presenters will report increased self-confidence in presentation skills	• Recruitment flyers, posters, & emails on campus • Database of school visits by presenters • Presentation evaluation forms that program staff and peers complete during rehearsals • Presenter self-evaluation/ feedback forms	• Results of program staff, peer, presenter, and teacher feedback forms • Results of program participants' focus group
Expose international student presenters to the broader community and culture	• Conduct a weekly seminar for presenters • Encourage presenters to visit a variety of schools • Advertise international student presentations to local school teachers	• 80% of presenters will report increased knowledge of American culture & the local community • 90% of presenters will visit at least two different schools	• Agendas for weekly seminars • Advertisements for international student presentations sent to schools and teachers • Presenter self-evaluation/feedback forms • Notes from post-visit seminar discussions	• Results from presenter and student feedback forms • Tallies of references (within & outside seminars) to community involvement
Assist K-12 teachers in providing accurate cultural information to students	• Develop and provide educational materials and information to teachers • Provide opportunities for teachers to ask questions of presenters	• Teachers will report increased access to accurate information about other cultures • Teachers will report enhanced interactions with people from other cultures	• Copies of materials provided to teachers • Database records of requests for presenters or information	• Results from teacher feedback forms • Summaries from teacher focus groups

This Evaluation Planning Form/Logic Model will also guide the presentation of findings of both monitoring and outcomes evidence.

Monitoring Evidence

Remember that Column 4 of the Evaluation Planning Form specifies what monitoring evidence will be collected. Monitoring evidence demonstrates that the activities prescribed in Column 2 are completed and of good quality.

Monitoring evidence demonstrates that the activities prescribed in Column 2 are completed and of good quality.

For instance, the first goal was to "*Enhance K-12 students' and teachers' understanding of different cultures.*" To accomplish this goal, International University committed to *"Provide cultural presentations at 30 schools per year"* (activities). The monitoring evidence that those presentations were provided is the "*Database of school visits for the year.*" Student and teacher feedback forms contain evidence about the *quality* of the program.

Depending on the size of the K-12 International Outreach Program, that database may be on paper in a file folder, in a Microsoft© Excel (Excel) spreadsheet, or in a Microsoft© Access (Access) database or in some other form. Whatever the format, the information must be summarized to demonstrate how many activities were completed.

If a "paper trail" was used to track completed presentations, K-12 International Outreach Program staff members will need to tally (count) the total number by hand. Again, if numbers are small, this is quite feasible.

Excel spreadsheets can be used to gather data on schools, requestors, requests, presenters, and presentations

Another option for collecting this type of monitoring evidence is an Excel spreadsheet. Excel spreadsheets can be used to gather data on schools, requestors, requests, presenters, and presentations (e.g., numbers of international presenters; numbers of presentations over the course of a month, semester, academic year; numbers of classrooms that have hosted presentations). Appendix C is a comprehensive Excel "cheat sheet" describing a variety of Excel features and functions.

As noted in Chapter 3, depending on the scope and scale of the program, K-12 International Outreach Programs also may choose to use the Access database to track monitoring evidence. Included in the database, the "Reports" tab can be used to create a report that provides summary information about a program. As shown in Figure 4.1, below, both Reports and Queries can be accessed from the Access database "Reports" tab.

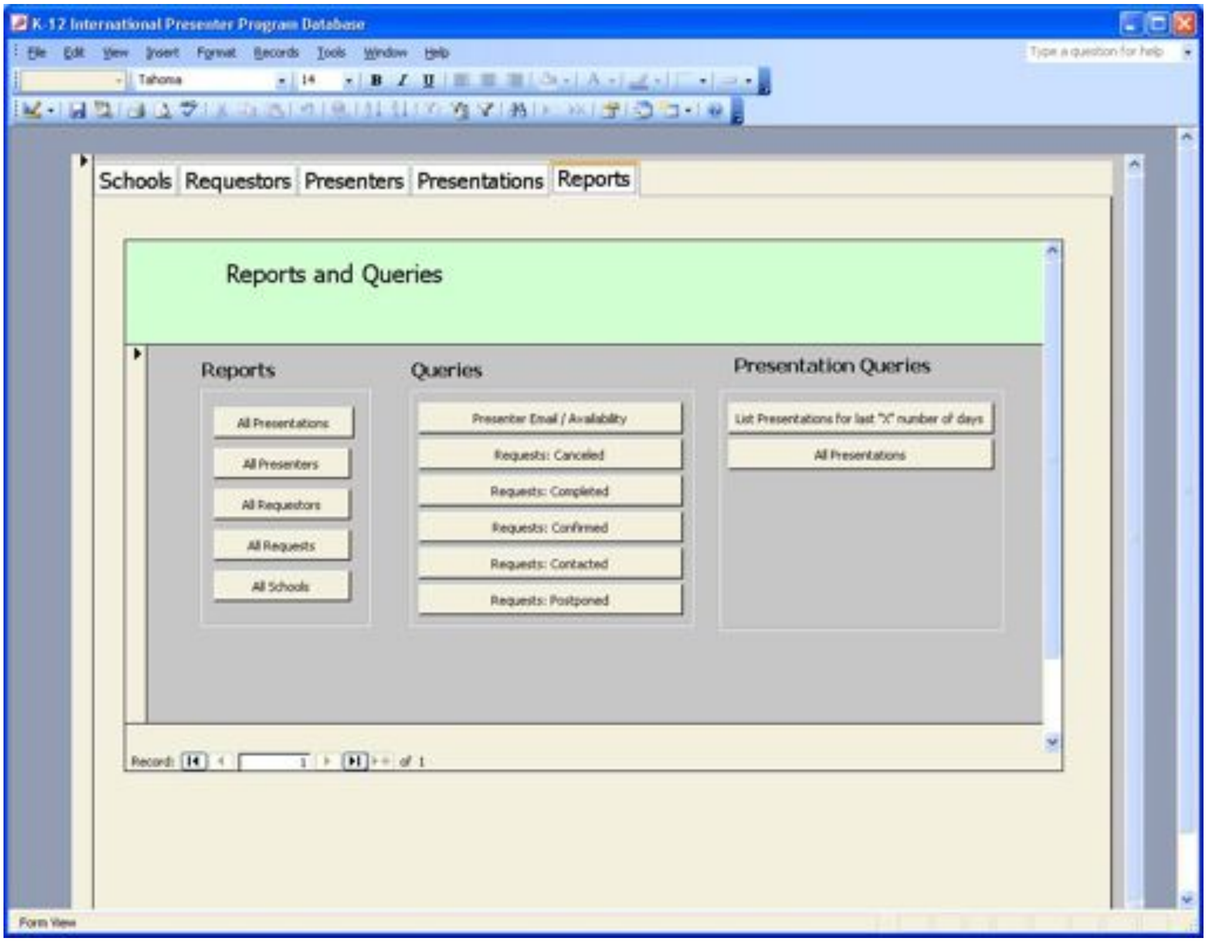


Figure 4.1: Reports Tab in Access Database

Reports

The reports generated in the Access database list "all" of a particular item: all presentations, presenters, requestors, requests, and schools. A program can choose, for example, to prepare a report of "All Presentations." However, depending on the size and scope of the program, what results may be a report that consists of many pages of presentations. Figure 4.2 shows one page of a report of "All Presentations."

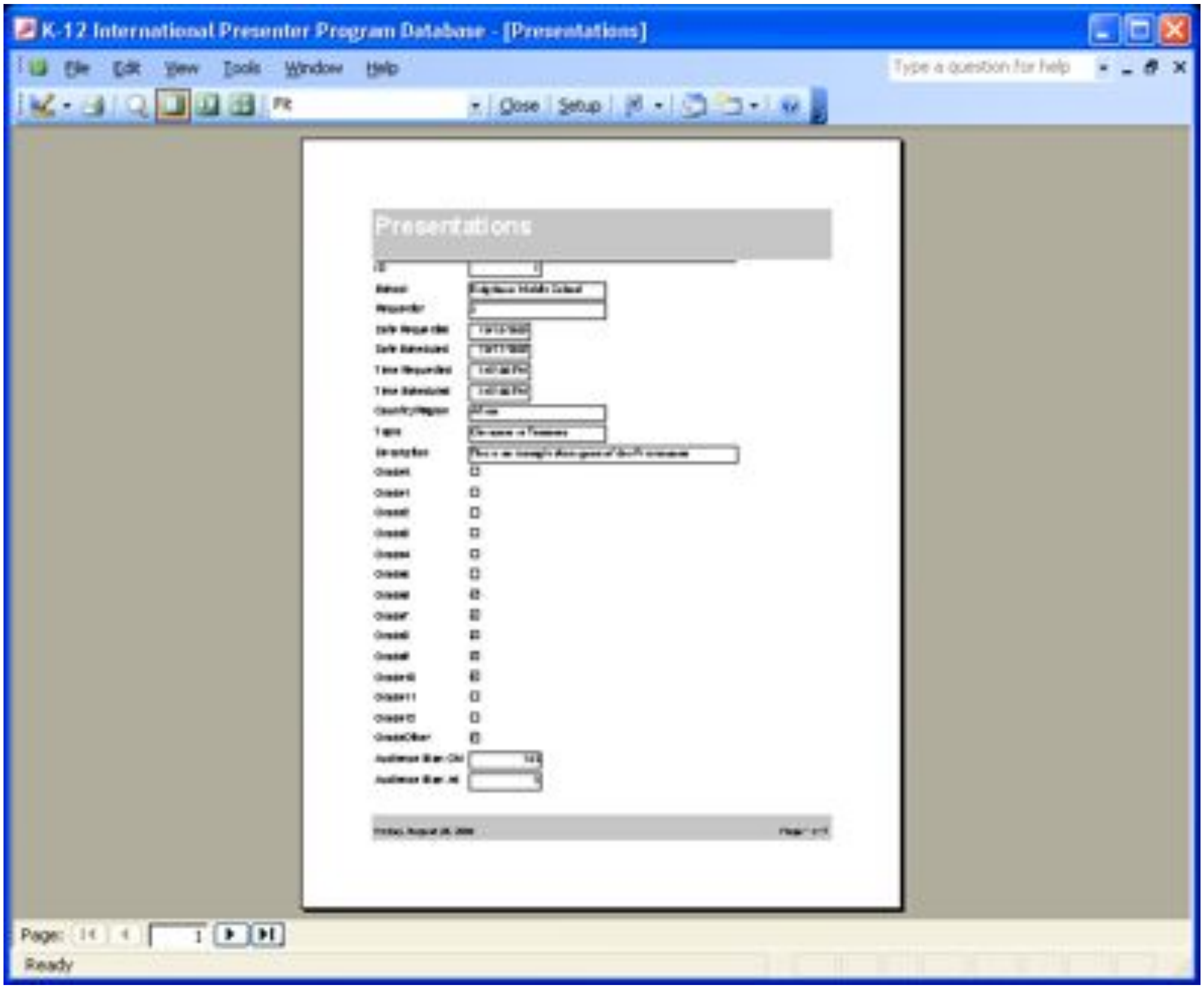
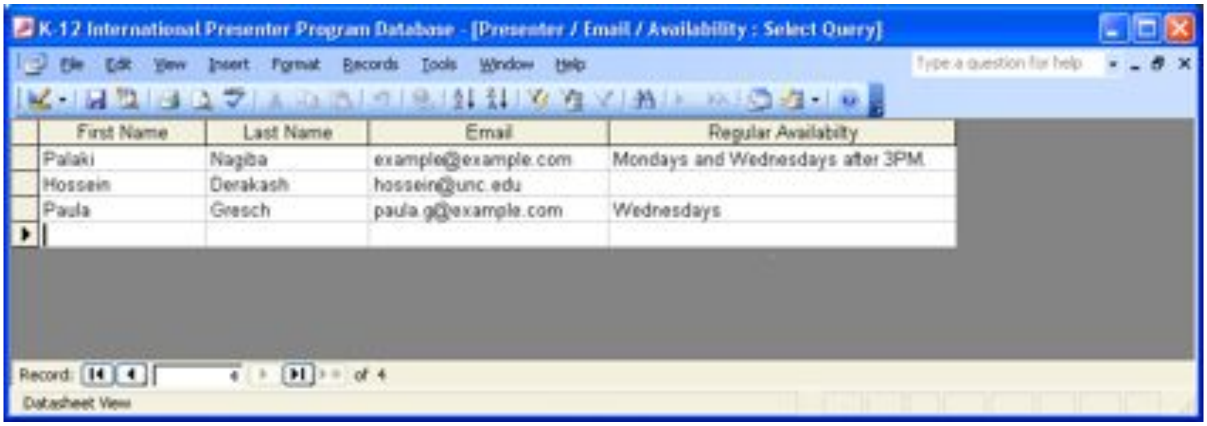


Figure 4.2: Sample page for "All Presentations"

Queries

To get more specific information, programs have additional Query options through the Access database. As shown in Figure 4.1 (above), the K-12 International Presenter Program Database includes several general Queries as well as Presentation Queries.

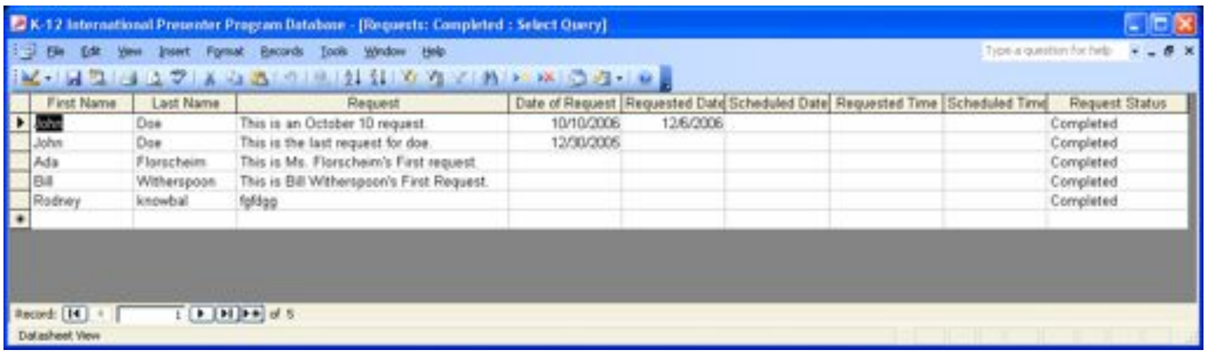
The general Queries included in the database include: Presenters' Email Addresses/Availability; all Canceled Requests; all Completed requests; all Confirmed Requests; all Contacted Requests; and all Postponed Requests. Selecting Presenter Email/Availability, for example, pulls data from the Presenters tab and displays the information in an Excel-type document (Figure 4.3):



First Name	Last Name	Email	Regular Availabilty
Palaki	Nagiba	example@example.com	Mondays and Wednesdays after 3PM
Hossein	Derakash	hossein@unc.edu	
Paula	Gresch	paula.g@example.com	Wednesdays

Figure 4.3: Presenter Email/Availability Query

Below, Figure 4.4 shows the results of the Query for Completed Requests.

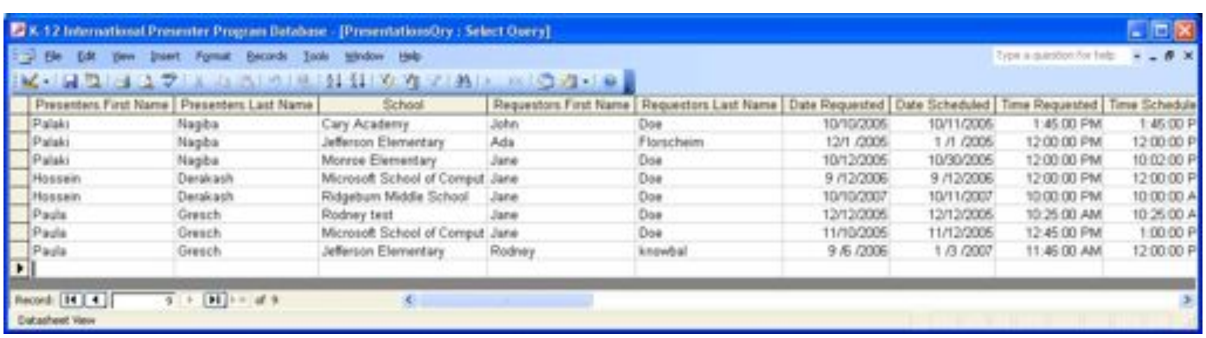


First Name	Last Name	Request	Date of Request	Requested Date	Scheduled Date	Requested Time	Scheduled Time	Request Status
John	Doe	This is an October 10 request.	10/10/2006	12/6/2006				Completed
John	Doe	This is the last request for doe.	12/30/2006					Completed
Ada	Florscheim	This is Ms. Florscheim's First request.						Completed
Bill	Witherspoon	This is Bill Witherspoon's First Request.						Completed
Rodney	knowbal	fgfdgg						Completed

Figure 4.4: Completed Requests Query

In addition, two Presentations Queries are possible: a list of presentations for the last "x" number of days, allowing program staff to enter a date range (e.g., from 01/01/2005 to 12/31/2005 – or – January 1, 2006 to December 31, 2006); or All Presentations.

Below, Figure 4.5 shows the first screen of results when All Presentations is selected. As the display shows, this selection pulls all information from the Presentations tab and presents the data in an Excel-type display (program staff can view the additional data by moving the blue scroll bar to the right).



Presenters First Name	Presenters Last Name	School	Requestors First Name	Requestors Last Name	Date Requested	Date Scheduled	Time Requested	Time Schedule
Palaki	Nagiba	Cary Academy	John	Doe	10/10/2006	10/11/2006	1:45:00 PM	1:45:00 P
Palaki	Nagiba	Jefferson Elementary	Ada	Florscheim	12/1 /2006	1 /1 /2006	12:00:00 PM	12:00:00 P
Palaki	Nagiba	Monroe Elementary	Jane	Doe	10/12/2006	10/30/2006	12:00:00 PM	10:02:00 P
Hossein	Derakash	Microsoft School of Comput	Jane	Doe	9 /12/2006	9 /12/2006	12:00:00 PM	12:00:00 P
Hossein	Derakash	Ridgeburn Middle School	Jane	Doe	10/10/2007	10/11/2007	10:00:00 PM	10:00:00 A
Paula	Gresch	Rodney test	Jane	Doe	12/12/2006	12/12/2006	10:25:00 AM	10:25:00 A
Paula	Gresch	Microsoft School of Comput	Jane	Doe	11/10/2006	11/12/2006	12:45:00 PM	1:00:00 P
Paula	Gresch	Jefferson Elementary	Rodney	knowbal	9 /6 /2006	1 /3 /2007	11:46:00 AM	12:00:00 P

Figure 4.5: All Presentations display from Presentation Queries

There are several options for narrowing the range of information displayed by an All Presentations Query. The first options work within Access, the second exports data to Excel. In the examples shared below, the goal is to generate a list of *Presentations* by *School* by *Topic* by *Grades 6-9.*

Working within Access, program staff can customize the report in two ways. The first is to highlight and hide columns NOT of interest (first highlight, then right click to choose Hide Column). In this instance, program staff could (a) *highlight* columns for Presenters' first and last names, Requestors' names, Dates and Times Requested and Scheduled, Grade levels from K-5 and 10-12, and Audience size, and (b) *hide* those columns to produce the report below (Figure 4.6).

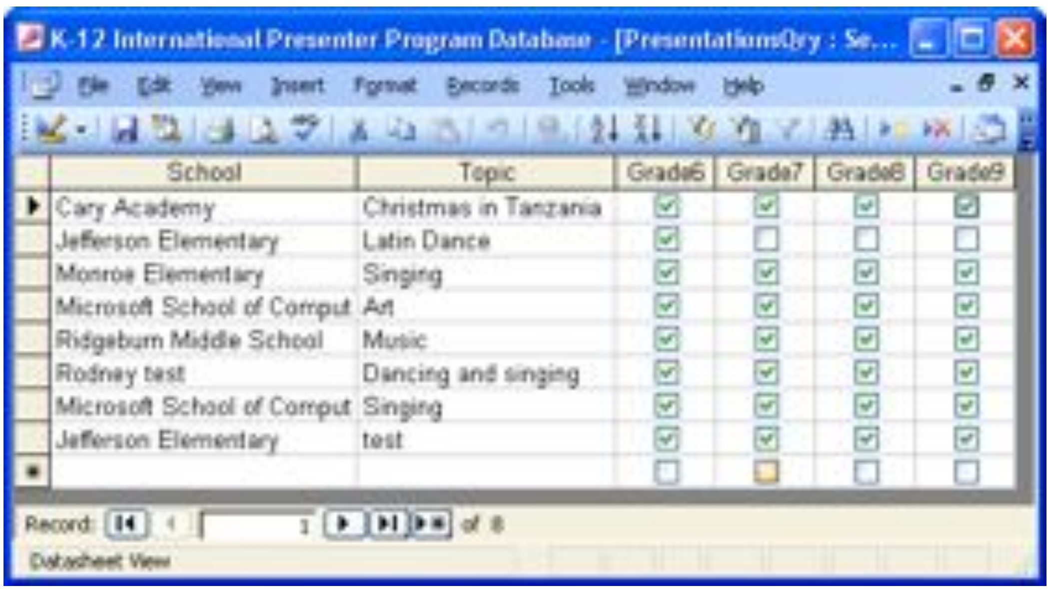


Figure 4.6: Presentations by School by Topic by Grades 6-9

Another option is to (a) right click on the data table displayed after selecting All Presentations (Figure 4.5), then (b) choose Query Design. Doing so generates the display presented below in Figure 4.7.

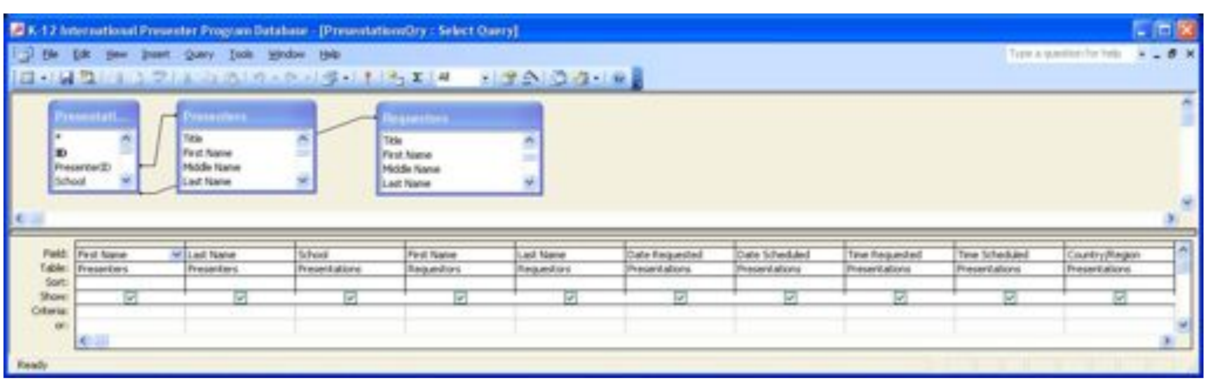


Figure 4.7: Query Design window

To generate the same display of information as indicated above in Figure 4.6, program staff can select only the green boxes below the data of interest, then choosing "Run" from the Query pull-down menu. When the Query Design window is displayed, all of the boxes are checked, so staff would de-select information not wanted on the report.

These options should be chosen only when program staff members want a quick display of information from the All Presentations tab. Although the option to Save the Query exists, program staff SHOULD NOT exercise this option, for doing so makes that requested information (*Presentations* by *School* by *Topic* by *Grades 6-9)* the default template.

Instead, if program staff members want to save information from a Presentation Query, or from a Report, the better option is to export the query (or the Report) to Excel and then organize and save data of interest. Exporting the data from the Access database into an Excel worksheet, program staff members can see the contents of the files in a condensed format.

The first step to do this is to select the button for the data of interest. For example, choosing the "All Requests" button under Reports produces a handout as many pages long as presentations requests that have been received (Figure 4.2); choosing the "All Presentations" button produces the display in Figure 4.5. To move the data from Access to Excel, staff members "right click" the report, then select "Export" from the menu, It is then possible to "Export Reports Requests" into Excel by giving the printout a name ("Save program as:") and choosing Excel from the "Save as type" pull-down menu. Program staff can then manipulate the Excel Presenters worksheet by selecting elements of interest and discarding the rest.

Figure 4.8 shows a portion of the Excel worksheet for the All Presentations *Query*, while Figure 4.9 (below) shows a portion of the Excel worksheet exported from Access for the All Presentations *Report*.

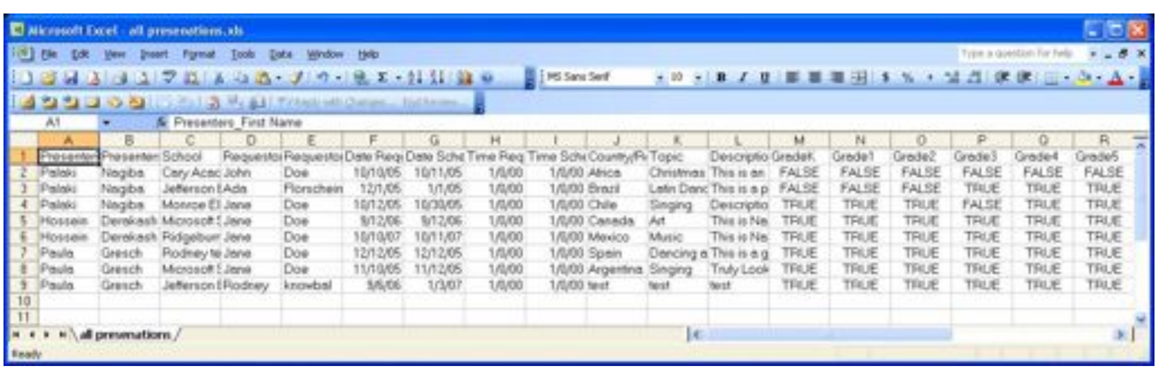
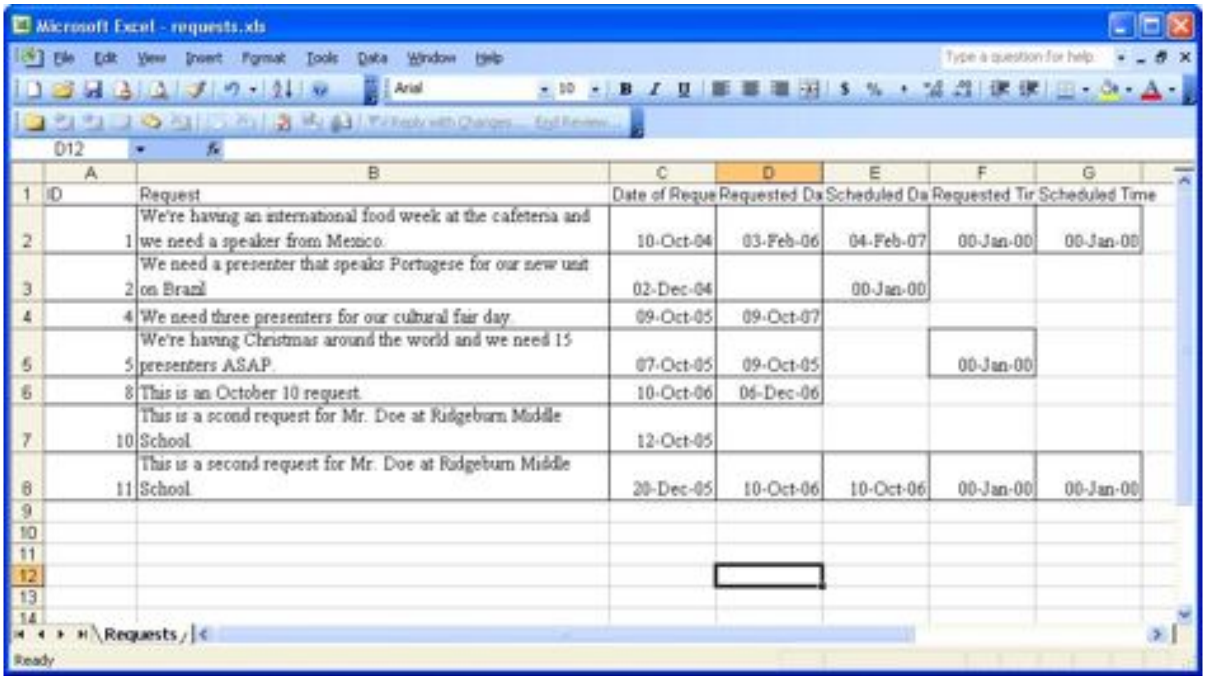


Figure 4.8: Excel worksheet for All Presentations Query



ID	Request	Date of Reque	Requested Da	Scheduled Da	Requested Tir	Scheduled Time
1	We're having an international food week at the cafeteria and we need a speaker from Mexico.	10-Oct-04	03-Feb-06	04-Feb-07	00-Jan-00	00-Jan-00
2	We need a presenter that speaks Portugese for our new unit on Brazil	02-Dec-04		00-Jan-00		
4	We need three presenters for our cultural fair day.	09-Oct-05	09-Oct-07			
5	We're having Christmas around the world and we need 15 presenters ASAP.	07-Oct-05	09-Oct-05		00-Jan-00	
8	This is an October 10 request.	10-Oct-06	06-Dec-06			
10	This is a scond request for Mr. Doe at Ridgeburn Middle School.	12-Oct-05				
11	This is a second request for Mr. Doe at Ridgeburn Middle School.	20-Dec-05	10-Oct-06	10-Oct-06	00-Jan-00	00-Jan-00

Figure 4.9: Excel worksheet from Access database export

This function allows program staff to summarize monitoring data of greatest interest to the program.

Remember that "Monitoring Evidence" is selected to provide formative data. Formative is an evaluation term that refers to evaluation for the purpose of program improvement. Formative data give the K-12 International Outreach Program a chance to assess itself *along the way* to the end goal. Such evidence can help staff *oversee* the processes of the Program and make necessary changes BEFORE a final evaluation report is completed. For instance, Program staff might review the programs presented quarterly during the school year. If 10 of 40 annual presentations have been given by the end of the first quarter, then staff might determine that progress toward the goal was on track. If, however, only 5 programs had been presented, the staff might make changes designed to increase requests and/or responses to those requests.

Summarizing Program Quality and Outcome Evidence

The same tools described in Chapter 3 for managing program implementation and monitoring program *activities* (e.g., tables, spreadsheets, databases) also can be used to manage information collected to judge activity quality and desired outcomes. Both data summary strategies are used to demonstrate that program quality and outcomes specified in the logic model have been achieved. K-12 International Outreach Programs might use the program information and monitoring tools and build on those by adding columns or cells (e.g., to requestor's worksheet in Excel), or by creating a new worksheet. They might also use these instruments to monitor the distribution and collection of outcome evidence.

For example, if a small program decides to collect teacher feedback surveys from 15-20 teachers in two schools, data collection can probably be monitored with a couple of pieces of paper, one for each school. Who are the teachers, were they given the surveys, were they returned, and, if not, were verbal or written reminders given? This information can be managed on a simple table as depicted in Table 4.1: Tracking Survey Response, below.

Table 4.1: Tracking Survey Response

	Teacher Name	Date Survey Distributed	Date Survey Returned	Date Reminder Sent
School A	1.			
	2.			
	…			
	20.			
School B	1.			
	2.			
	…			
	15.			

This table might be all the program would wish to track in a small scale program like this. If so, there may be no need for a more sophisticated management scheme.

On the other hand, suppose the program decides to collect teacher feedback surveys from 100-150 teachers across 10 schools. In this case, program staff members are not available to visit each school to distribute surveys, provide verbal reminders, etc. An Excel spreadsheet could be used to manage the information. Such a spreadsheet might include the teachers' names, organized by school, and then columns for each of the "events" to be tracked: survey distributed, survey returned, reminder, survey returned after reminder, etc. Figure 4.10, below, shows an Excel spreadsheet that could be constructed to organize the distribution and return of outcomes data.

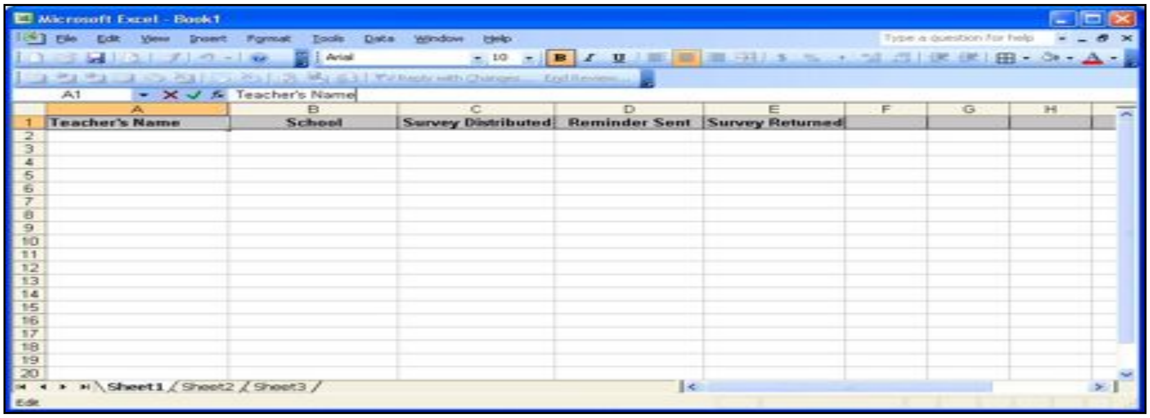


Figure 4.10: Excel worksheet tracking outcomes evidence

Program Quality & Outcome Evidence

Remember that Column 4 of the Evaluation Planning Form specifies collection of monitoring evidence about program quality and Column 5 focuses on "outcome" evidence. Evidence in these cases are evidence of a) participant satisfaction or learning through "Activities" (Column 2), or b) *results* that are used to demonstrate that the "Outcomes" (Column 3) were achieved.

Before going to the specific examples, there are some general guidelines that will help users summarize their evidence. Once the evidence specified has been collected, K-12 International Outreach Program staff members must decide what to do with it. They must consider the nature of the evidence and what summaries might make the results most useful to stakeholders. The answer to "how" to proceed with summarizing evidence differs for quantitative and qualitative evidence.

Summarizing Quantitative Evidence

As first described in Chapter 3, quantitative evidence is numerical; it consists of things that can be counted. With monitoring evidence, numbers of requests for presentations, numbers of presentations, numbers of presenters, numbers of different teachers or schools, etc. can all be counted and summarized.

With program quality and outcome evidence, responses to survey questions can be counted. Typically, the tallies of responses to survey questions are done by question, so that each question is summarized separately. When reporting quantitative data, summaries of survey responses typically include the following statistics:

- Number (N) of responses for each question
- Frequency (*f*) of responses for each response
- Mean (M): the average response
- Standard Deviation (SD): the average distance from the mean, which shows how spread out the responses are from the mean

Another possibility might be to show the percentage for each response on the survey.

> How quantitative evidence is counted and summarized depends on the size of the program.

As described above, how quantitative evidence is counted and summarized depends on the size of the program. With very small numbers where data have been kept on paper, a calculator will work. If limited data have been organized in an Excel spreadsheet, the formulas provided within the Excel program will serve to compute the summaries suggested (We have created in Appendix C: Excel "Cheat Sheet," a short guide of how to do this for people new to Excel). However, the Access database is much more powerful for entering, organizing, and summarizing data if numbers are large. In Access, "queries" can be used to help answer evaluation questions about numbers. To run statistics on these numbers, however, a Program will want to "export" information from ACCESS to Excel (as described above).

These summaries are simple, but they are "real" statistics. Thankfully, even the most math-challenged person can compute these numbers. This process is adequate for the surveys included in the Evaluation Tool Kit. If a K-12 International Outreach Program wanted to do even more with the analysis of their data, computerized programs make that possible, too. The most popular programs are SAS (Statistical Analysis System) or SPSS (Statistical Package for the Social Sciences).

Significance of Quantitative Data

Program staff and/or stakeholders may question whether or not the statistics reported are "significant." Though there are tests for significance (e.g., the *t* test) that can be run using computerized programs, the preferred option is currently to compute effect size.

Simply, effect size is the difference in the standard deviations on a given measure between Group A and Group B. The advantage of reporting effect size measures is that the actual value of the effect size can be interpreted. For instance, an effect size of 1 would mean that there was a difference of 1 standard deviation between Group A and Group B. That difference would be considered very large. For example, translated into percentiles scores, if Group A's average scores were in the 50th percentile, Group B's would be in the 84th percentile. Even an effect size of .5 (half a standard deviation difference between Group A and Group B) can be considered important.

We are not aware of K-12 International Outreach Programs that have used effect size to report evaluation results. However, program staff members might find examples from other disciplines useful. For instance, currently, the achievement difference between students in a pre-school class with a teacher who has a bachelor's degree and those with one who does not has been found to equal about .5 in effect size. For prevention programs, an effect size of .25 is considered good.

Based on examples shared by partners in the development of these resources, K-12 International Programs are likely to find only small differences in standard deviations. Therefore, effect size would likely be very small. However, an increase in effect size can be used as evidence of program improvement. Additionally, programs may choose to use effect size to prevent staff and/or stakeholders from jumping to conclusions about apparent increases that are not justified.

Summarizing Qualitative Evidence

> Qualitative evidence is narrative; it yields information in words rather than numbers.

Qualitative evidence is narrative; it yields information in words rather than numbers. It includes data from open-ended survey responses, focus groups, interviews, and observation notes. Like quantitative data, narrative evidence needs to be summarized to be useful to stakeholders.

With very small numbers of qualitative data (typically less than 20), responses are grouped by similarities, and all responses might be listed. With more than 20 responses, categories can be formed that will organize and summarize the responses, typically including numbers and percentages of responses for each category, and a sample of responses might be shared.

The most common strategy for formulating these categories (i.e., analyzing qualitative data) is content analysis. This process is used to form categories or themes that will organize the data and help answer the evaluation questions. When doing a content analysis, Program staff members begin by reading 10-20 responses; similar responses are then grouped and assigned a name that captures the similarity. Remaining responses are then coded (assigned to categories) and adjustments to the categories made. The categories can be pre-existing, emerging, or a combination of the two. For instance, K-12 International Outreach Program staff might expect "exposure to other cultures" to be a pre-existing category on open-ended survey responses, so the coding might start with that. Other categories might emerge as the responses are reviewed, perhaps "unanticipated benefits" or "persistent stereotypes." In either case, actual responses are used to back up, or "narrate" the selection of the categories.

Good qualitative analysis is characterized by intellectual rigor and documentation. For most data collected by K-12 International Outreach Programs, the human brain will work just fine for the analysis. If more is required, there are now computerized programs that will help manage large amounts of qualitative data. They are Atlas-ti and NVivo.

In evaluation, the use of both quantitative and qualitative evidence will make the findings richer. Numbers reveal how many students agreed that they liked the presentation. Qualitative responses are necessary, though, to understand *what* those students liked about the presentation. Used together, a deeper, richer understanding is possible.

In evaluation, the use of both quantitative and qualitative evidence will make the findings richer.

The examples below demonstrate how evaluation evidence might be summarized. The examples are based on summaries developed by "International University." Remember that the summaries should be designed to provide accurate and clear evidence that will help stakeholders answer the evaluation questions.

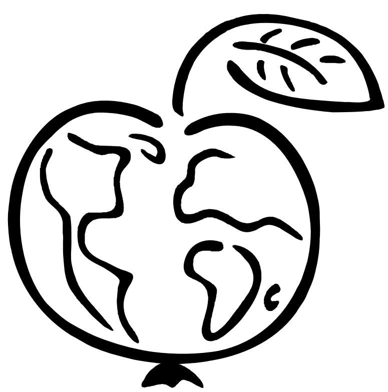
Example 1: Student Feedback Form

On the sample Evaluation Planning Form for International University, the first Goal listed was, "*Enhance K-12 students' and teachers' understanding of different cultures.*" The Outcomes stated for that goal were: "*Increase cultural presentations to at least 400 students in the school district,*" and "*80% of students and teachers will report increased knowledge of international culture.*" In Column 4 (Monitoring Evidence), the K-12 International Outreach Program committed to use the results of Student Feedback Forms (along with a database of school visits and Teacher Feedback Forms) to determine whether or not the presentations were of good quality. In Column 5 (Outcome Evidence) students' enhanced understanding of different cultures was to be measured.

Figure 4.11 summarizes the Student Feedback Forms (which is available through the Evaluation Tool Kit's Survey Generator). Questions 1-5 on the form are quantitative responses; Question 6 requires qualitative responses. The responses in Figure 4.11 are narrated below.

The quantitative summary of responses on the Student Feedback Forms is based on questions 1-5. The summary indicates that 129 students completed the feedback form. In addition, the summary demonstrates that 125 of the 129 students who answered the questions responded positively to the presentation. With 4 as "excellent," the means (M) on all questions were closer to "excellent" than to "good." In addition, the Standard Deviations (SD) indicate a small range in the responses. Both the number and percentage of each response is included to allow people to view the summary data in two forms. With fewer than 50 respondents, percentage data should not be reported as it tends to be misinterpreted by readers.

While the numbers are positive, they do not tell stakeholders whether or not the presentations enhanced students' understanding of different cultures. The full answer to that question requires summarizing the qualitative evidence. On this Student Feedback Form, Questions 6-9 ask open-ended questions. The responses to Question 6 are summarized in Figure 4.11.



Sample Elementary Student Survey Summary
K-12 International Outreach Program
2006

	 Excellent	 Good	 Fair	 Poor	N	M (4=Exc)	SD
1. Today's talk was:	71% (91)	27% (35)	2% (3)	0% (0)	129	3.7	0.5
2. The speaker's understanding of the subject was:	63% (81)	32% (41)	5% (6)	1% (1)	129	3.6	0.6
3. The speaker's way of working with my class was:	78% (101)	20% (26)	0% (0)	0% (0)	127	3.8	0.4

	 Yes	 No	N
4. Did you like the talk?	98% (125)	2% (2)	127
5. Did you understand the talk?	94% (118)	6% (7)	125

6. What was best about the talk? (sample comments)

- My best part is what they play with like the top and in Mexico we have (a) too. I can play that top sometime.
- Showing how they dressed in Chile.
- The discussions with the questions.
- The best part about the talk was when Ms. B. passed around money from Venezuela so we could compare it with dollar bills.
- The best was when she talked about the food and the weather.
- The best was when she explained what the flag stripes meant.
- The best talk was when she was talking about the big parties they had.
- When she told us about their games.
- The best was with the transportation.
- Her talking about the country and seeing the waterfall....

Figure 4.11: Summary of Student Feedback Form

In this example, over 120 students completed the Student Feedback Forms. Clearly, listing all 120+ responses to each of the open-ended questions would be unreasonable. In this case, 20 Student Feedback Forms were selected randomly, and the open-ended responses on those forms (Questions 6-9) were listed, generating a "sample" of 80 responses, 20 for each of 4 questions. Reading through the sample qualitative responses indicates that the presentations did, in fact, enhance students' understanding of different cultures. Therefore, the Student Feedback Forms provide evidence that the goal has been met. The summary here only reports the first 10 comments for Question 6, but the process would be completed for the remaining 10 and then repeated for Questions 7, 8, and 9.

Another possibility for summarizing the qualitative responses to the open-ended questions would be to use the content analysis process described above. That process would yield categories or themes for each of the 4 open-ended questions. The summary would be more succinct and might yield more in depth understanding of the collective responses.

Example 2: Presenter Feedback Form

The sample Evaluation Planning Form for International University indicates that the K-12 International Outreach Program seeks to impact not only K-12 students and teachers, but also the international students themselves. For example, the second goal is to, "*Improve international students' (presenters) English presentation skills.*" The related outcomes are *"Each presenter will rehearse presentations and receive feedback from program staff and peers before going into schools,"* and *"80% of presenters will report increased self-confidence in presentation skills."*

Numbers alone cannot answer the evaluation question.

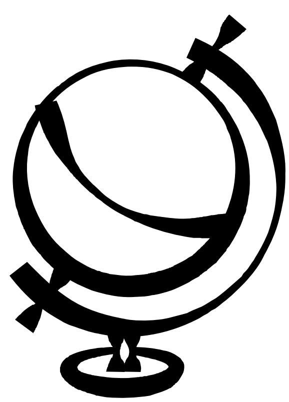
The Presenter Feedback Form is one measure used to evaluate those outcomes. The example below (Figure 4.12) shows how International University summarized those forms. In this case, because the number of responders (6 presenters) is small (N=6), it would not be appropriate to add percentages.

Again, numbers alone cannot answer the evaluation question. However, they can raise possibilities that might be further explored in the qualitative responses. Note, for example, that 3 of the 4 presenters who answered Question 3, rating the overall presentation, answered "good." The open-ended responses following that question suggest that the presenters see some ways that they might improve their presentations.

In this example, because there were only 6 presenters, the qualitative responses to the open-ended questions can all be listed. There are too few to categorize by question. In addition, the questions are different and, therefore, could not be combined for summarizing purposes.

The process of summarizing qualitative comments (seen here for Question 3), would be repeated for Questions 9-12.

Note that part of the outcome for the second goal is to "*increase confidence*" of the international students. Except for the question, "How, if at all, did you benefit from participation in our program" (Question 11 on the survey developer), there is little on the Presenter Feedback Form to help determine whether or not this occurred. Rather, the program participants' focus group should yield good information to help answer this question.



Sample Presenter Feedback Summary
K-12 International Outreach Program
2006

	Yes	No	N	M (2=yes & 1=no)	SD
1. Did you enjoy the presentation?	6	0	6	2	0

	Excellent	Good	Fair	Poor	N	M (4=Exc)	SD
2. Overall, today's presentation was:	1	3	0	0	4	3.3	0.5

3. What changes would you make to improve the presentation for future classes?

- No response
- More posters or overheads, transparencies. Also more preparation because I don't have experiences with students.
- To give students an idea about the country, prepare them for the presentations before.
- More pictures.
- The teachers also listen to our presentation.
- I think that I can use more transparencies and more time for preparing my presentation.

	NA	Strongly Agree	Agree	Disagree	Strongly Disagree	N	M (4=Exc)	SD
4. I think that I interacted well with the students.	0	2	4	0	0	6	3.3	0.5
5. The program staff was readily available to answer my questions.	0	2	4	0	0	6	3.3	0.5
6. The training or orientation provided by program staff was excellent.	0	3	3	0	0	6	3.5	0.5
7. The program staff provided accurate information about the presentation.	1	2	2	0	0	5	3.5	0.6
8. The program staff provided transportation or accurate travel information.	0	3	1	1	0	5	3.4	0.9

Figure 4.12: Summary of Presenter Feedback Form

Example 3: Teacher Focus Group

The last goal listed on the sample Evaluation Planning Form is, "*Assist K-12 teachers in providing accurate cultural information to students.*" The associated outcomes are, "*Teachers will report increased access to accurate information about other cultures*," and "*Teachers will report enhanced interactions with people from other cultures.*" Summaries from teacher focus groups are cited as one method of evaluating whether or not that outcome is accomplished.

A sample Focus Group Protocol is included in the Survey Generator of the Tool Kit. The focus group responses used in this example are taken from responses to the question, "What do you think is the primary value(s) of the program?"

The sample Teacher/Presenter Focus Group Protocol in the Tool Kit contains eight questions. As always, the number or content of the questions can be modified to meet the particular needs of the K-12 International Outreach Program using them. The sample instructions for the facilitator of the focus group include this statement:

I want to ensure that I hear from everyone today because all of your opinions are important to us. For the first question, I want to move around the circle and give everyone the opportunity to respond. Please state your first name and tell me…

For purposes of summarizing evidence, assume everyone in the circle answers the following question. The person taking notes captures the responses and later edits them, reviewing the tape recording of the session. In this example, there are 18 respondents in the group, more than the typical 5-12 recommended for a focus group.

Focus Group Feedback Form
Your International Outreach Program
August 2006

Question: What do you think are the most important purposes of K-12 international programs?

Responses:

- For students to learn and interact with persons from a different country and culture
- Meaningful connections with book information and people from the country
- Beneficial for speakers (practice presenting) and students (hear first-hand info about countries being studied
- To bring Latin culture to children in order to highlight the importance to learn a second language
- It is a great opportunity for children to meet people from other cultures.
- Students can see and make the real-world connection.
- Providing information about other countries
- Primary value is to educate the students more about a particular Spanish speaking country
- For students to learn the culture of another and see the differences between life in America and Japan and Korea
- To give students first-hand knowledge
- Cultural understanding
- Bringing geography to live
- To introduce our students to people from other countries
- For students to learn parts of another culture
- Sharing of ideas and cultures
- Exposing children to other cultures with a native speaker
- To expose American children to Japan
- I think it was wonderful to increase the student's awareness of other cultures.

Figure 4.13: Focus Group Responses

In this example, all of the 18 answers to the question are included. It is important to have each of those answers as "evidence" for those who are charged with understanding what teachers perceive as the purposes of K-12 International Outreach Programs. Making sense of these responses may be the responsibility of one staff person or a group of people, even including stakeholders outside the program.

However, most stakeholders (within and outside the Program) will not want to see 18 answers to 6 different questions. Especially for reporting purposes, this is an example of where content analysis can and should be applied. Remember that content analysis involves the process of looking for "umbrella" categories that encompass all of the responses. In this example, those categories might be:

Table 4.2: Content Analysis

Category	N	Examples
Factual knowledge of other cultures	9	Learn, provide information, educate
Awareness & understanding of other cultures	6	Student awareness, cultural understanding
Interaction with others	5	Interact, expose, introduce
Other	2	Language, presenter benefits
	22	

Note that in the summary above (Table 4.2), there are more responses (22) than original answers to the question (18). This is because some answers were coded in more than one way. For example, the first answer, "For students to learn and interact with persons from a different country and culture," was coded as both "factual knowledge" and "interaction with others."

Once the categories have been established, it is important to go back to each of the original responses and code them, making sure that the categories "work" to include all the responses. If there are responses that do not "fit" into a category, they can be listed separately. It is important not to lose the unique response(s) just because they do not "fit" the categories established.

In this example, the content analysis suggests that teachers report that the K-12 International Outreach Program serves several purposes. The primary purpose is to help students learn facts and information about other cultures. In addition, teachers see the purpose as increasing awareness and understanding of other cultures and providing opportunities for interaction with people from other cultures. The K-12 International Outreach Program staff can make such statements because there is evidence (documentation) to support them.

Summary

Summarizing evaluation evidence is an important part of the process. It makes the data collected accessible to those who will make use of it. When done well, those summaries provide users with clear, accurate, and useful representations of the collected evidence.

Completing the summaries, however, is not the end of the process. Next is to ask the question, "So what does all this mean?" K-12 International Outreach Programs must move from summarizing the data collected to communicating that summary to various audiences. Often the program also must make a judgment about the findings. It is useful to involve key stakeholders in reviewing drafts of the report findings and in interpreting what the data might mean for the program. It's also necessary to consider the implications of the findings for program improvement or program change. These aspects of the evaluation are what will be reported to various stakeholders. Evaluation Reporting is the subject of Chapter 5.

CHAPTER 5

Evaluation Reporting

The culminating event in the evaluation process is to review and report the data. Thorough and careful planning led to good decisions about what monitoring and outcome evidence would yield information about selected goals and objectives. Intentional and well-organized collection of the specified data provided the "raw material" for the evaluation. Summarizing that data made it accessible and useful. At last, it is time for the final step in the process — reviewing and reporting the information in ways that facilitate its use. This chapter will help users in K-12 International Outreach Programs do just that.

Using the Evaluation Map, this chapter focuses on the last two steps, 7 and 8 below.

1.	2.	3.	4.	5.	6.	7.	8.
Determine Program Goals & Objectives	Plan Program Activities	Identify Desired Outcomes	Choose Evaluation Tools	Collect Data	Summarize Data	Report Findings	Use findings to revise goals & objectives and improve program

The first part of this chapter focuses on different reporting formats, including considering different audiences for evaluation reports and different reporting options. The second part of the chapter adapts the Evaluation Planning Form/Logic Model in order to consider the various elements of an Evaluation Report. Then two examples of Evaluation Reports are offered. The chapter concludes with a consideration of how evaluation findings can be used for program improvement.

Reporting Choices

Considering the Audience(s)

Early in the planning process, the question of "audience" was raised and answered. An Evaluation Planning Form/Logic Model was designed that would provide program staff and other stakeholders with focused, relevant, efficient, and useful evaluation information.

Those same stakeholders must be considered again in deciding how to best review and report the summarized evaluation data. For K-12 International Outreach Programs, those stakeholders likely include program staff, participants (international students, presenters, K-12 students and teachers), and current and future funders.

For each identified audience, there also is a choice about how often to review evaluation data — at an interim point, as a final step, or both. If interim evaluation findings can be used to improve the program (as discussed in Chapter 4 in relation to certain monitoring evidence), there is no need to wait until the evaluation is complete to begin that process.

> For each identified audience, there also is a choice about how often to review evaluation data.

Program Staff

The most obvious, and probably most interested, audience is the program staff. They have a vested interest in both monitoring and outcome data. Because of that, evaluation data should be shared with them at regular intervals. Consider, for instance, the example of summarized data from presenter feedback forms in Chapter 4. Six presenters had completed the forms and answered Question #3 as follows:

3. What changes would you make to improve the presentation for future classes?

- *No response*
- *More posters or overheads, transparencies. Also more preparation because I don't have experiences with students.*
- *To give students an idea about the country, prepare them for the presentations before.*
- *More pictures.*
- *The teachers also listen to our presentation.*
- *I think that I can use more transparencies and more time for preparing my presentation.*

Three of the six responses suggest that the presenters could use help in preparing visual aids (posters, pictures, overheads, transparencies) for their presentations. Assume that the K-12 International Outreach Program conducts a weekly seminar for students and presenters. Once this need for assistance has been identified, the program might devote one of those weekly sessions to addressing the need. How to develop quality visual aids might become the agenda for an upcoming seminar. To delay responding until the final data are summarized and reported benefits no one. In fact, delay may lead to frustration on the part of presenters who perceive that their presentations could be improved.

> Interim reviews of data by program staff serve another function.

Interim reviews of data by program staff serve another function. Sometimes, those reviews identify concerns about the evaluation itself. There may be a need for changes or even the addition of new components. If so, the earlier they are uncovered and addressed, the better. For instance, if surveys are not being returned, program staff may need to reconsider the process for collecting surveys. In another example, if responses to a given survey question are <u>very</u> different, it may indicate that the question is being misunderstood. If that seems to be the case, program staff might want to modify the question in the Survey Generator.

Program staff members also are a primary audience for the final evaluation findings. Because they know more about the program than anyone, they should see an early draft of such findings. First, they can ask and answer the question, "Do these findings match our experiences in the program?" Second, summarized findings do not always speak for themselves. Rather, it is sometimes difficult to figure out what those findings mean. Program staff can be very useful in interpreting the meaning(s) of those data.

<u>Funders</u>

Those responsible for funding K-12 International Outreach Programs are always interested in seeing how their money has made a difference. For existing funding sources, evaluation findings can help support a decision to continue support in the current budget and/or help justify increases.

Evaluation reports also can help promote new funding. Funders like to see evidence of a quality program delivering on intended outcomes. The evaluation report can serve this purpose well, providing evidence that new monies invested in the program will be well spent.

Many K-12 International Outreach Programs are located in a university setting. Depending on where K-12 International Outreach Programs are located in the university's organization, there may be others who would be interested in the evaluation report. These might include Offices of the President, Schools of Education, and other academic programs. Whether or not those persons are directly responsible for funding, evaluation reports can provide evidence that the program is serving its intended purposes and inform colleagues about program activities.

Participants

Program participants are another potential audience for the evaluation report(s). International students, presenters, K-12 students, and teachers will appreciate knowing that their contributions served a purpose. During implementation of the program evaluation, all those audiences were likely asked to complete feedback forms or participate in focus groups. Knowing that those forms or events contributed to the evaluation findings make participants feel appreciated. It also may enhance their willingness to participate in future evaluations and continue involvement with the program.

Evaluation findings prepared for the participant audience(s) usually are not as detailed or technical as for other audiences. For them, a one-page summary may suffice to demonstrate the value of the program and to say, "Thanks for helping us improve the program." Such a brief summary might include:

Evaluation findings prepared for the participant audience(s) usually are not as detailed or technical as for other audiences.

- Purpose of the evaluation
- What was evaluated
- Findings—both strengths and weaknesses
- Recommendations

Public/Community

Other audiences for whom an abbreviated summary of evaluation findings might be appropriate would be various publics, within the university and the larger community. Sharing findings with such groups can help promote the program and increase its visibility.

Whether through campus newsletters, the local newspaper, presentations for civic groups, or other appropriate means, a well-crafted summary of evaluation findings can be useful and worthwhile.

Considering the Reporting Choices

How the evaluation findings are reported depends on the intended audience(s) and what the K-12 International Outreach Program hopes to accomplish by sharing those findings. The program might consider questions like:

- Who is the intended audience?
- What would that audience be interested in knowing?
- What is the purpose in sharing evaluation findings with that audience?

The answers to those questions drive decisions about how the evaluation findings might be reported.

Frequently, the shorter and more engaging the report is, the better. As with other aspects of the evaluation, it is a waste of human and fiscal resources to do work that is not useful and meaningful to stakeholders. The same is true of evaluation reports. Huge, detailed reports that simply gather dust on someone's shelf are a waste of time, effort, and money.

> Frequently, the shorter and more engaging the report is, the better.

To avoid that, it is important to choose wisely how the evaluation findings will be reported, remembering that there may be different choices for different audiences. Choices in methods of reporting include:

- **Interim Evaluation Reports**—This option is usually written and summarizes findings for a specified time period, e.g. quarterly. Typically, it reports evaluation activities and summarizes data for that time period.

- **Summary Evaluation Report**—This is often called the final evaluation report. Also written, it typically answers the question, "To what extent, if at all, have we accomplished the goals and objectives we established?" Typically, the data sources that answer that question are summarized and reported.

- **Executive Summary**—This report is often added to lengthy evaluation reports. It provides readers quick access to the contents of the longer report. Typically, it summarizes the key evaluation findings.

- **Press Release**—This report, also based on the evaluation report, is provided for media outlets. Written in easily accessible language, it invites newspapers, newsletters, magazines, even TV stations to cover and report the evaluation findings.

- **Web Postings**—This option, posted on the program's website, makes the evaluation findings available to a wider audience. It might include the Executive Summary, excerpts from the final report, and/or the press release.

- **Monographs**—These documents are usually written to share lessons learned from the evaluation with wider audiences. They might be shared at conferences, in journals, or made available by request.

- **Portfolios**—This is a collection of program reports and artifacts that represent what has occurred in the program. Viewing the portfolio can help those interested gain insight into the program.

- **Videos and PowerPoint Presentations**—These approaches can be easily understood by most audiences. They can be very persuasive and help the program communicate program events and accomplishments.

The language in a monograph intended for an academic audience will be different from that in a press release.

For any of these reporting methods, there also are choices about the degree of formality. An interim report for program staff might be a simple outline accompanied by an oral report. The language in a monograph intended for an academic audience will be different from that in a press release. Again, it is a matter of considering the audience and purpose, then choosing appropriately.

Finally, there is the question of technical detail. That detail may be left out of the reports to keep them short, accessible, and engaging but should be part of a "technical report" that documents the key evaluation activities. Those details might include how samples were selected, how instruments were developed, and how data was analyzed and summarized. It would also provide the detailed tables and data summaries, upon which the less technical reports were based.

According to evaluation standards, the paper trail of the process should be good enough that an outside person could come in, follow the process, and arrive at similar results. Normally, the actual data collected should be kept on file for three years.

Revisiting the Evaluation Planning Form/ Logic Model with Accomplishments

So what goes into the evaluation report? Decisions have been made about the types of reports appropriate for the particular audiences. The K-12 International Outreach Program has collected, analyzed, and summarized both monitoring and outcome data. The next question is what to share. The best way to answer that question is to return to the Evaluation Planning Form/Logic Model that has been driving the evaluation all along.

Now, however, it is time to add a 6th column to the form—Accomplishments. Consider, for instance, the first goal: *"Enhance K-12 students' and teachers' understanding of different cultures."* For purposes of reporting, consider two adaptations to the form.

- First, turn the "Goals and Objectives" statement into a question.
- Second, add a 6th column called "Accomplishments."

Expanded Evaluation Planning Form/Logic Model

Monitoring evidence has been collected, analyzed, and summarized to demonstrate to what extent the activities were carried out. Outcome evidence has been collected, analyzed, and summarized to reveal whether or not the desired outcomes were achieved.

In our example, for instance: The Goal/Objective becomes the question, *"To what extent, if at all, did the program enhance students' and teachers' understanding of different cultures?"* The new "Accomplishments" column answers that question based on the evidence collected.

Expanded Evaluation Planning Form/Logic Model

			MONITORING ACTIVITIES	EVALUATING OUTCOMES	
Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**	**Evidence of Results**	**Accomplish-ments**
"To what extent, if at all, did the program enhance students' and teachers' understanding of different cultures?"	Provided cultural presentations at 30 schools per semester	Increase cultural presenta-tions to at least 400 students in the school district	Database of school visits for the year Student feedback forms Teacher feedback forms	Database of school visits Previous year's Accomplish-ment Report Results of student, teacher, & presenter feedback forms	

The "findings" that go in the new "Accomplishments" column become the "results" that are shared in the evaluation report.

Evaluation is only worth doing if it is useful and helpful to the program.

By following this procedure for each Goal/Objective on the Evaluation Planning Form, the K-12 International Outreach Program will have most of the elements for the evaluation report. The elements that still need to be developed are interpretative—"What does this all mean?" Once again, the evaluation is only worth doing if it is useful and helpful to the program.

The interpretative work to answer, "What does all this mean?" is a good opportunity for collaborative thinking. As mentioned above, the evaluation findings do not always speak for themselves. The stakeholders, especially program staff, can help make sense of those findings. That process can lead to clear and meaningful understandings about what is working well, what is not working so well, and what might need to be changed to make the program work better.

Evaluation Report Elements

What exactly goes in the evaluation report depends on the choices described above (audience, format, formality, technicality, etc.). However, most evaluation reports will include the following elements (Table 5.1):

Table 5.1: Evaluation Report Elements

Short Description of the Program
• Goals/Objectives of the program • Description of populations served (e.g., demographic information) • Numbers served
Description of the Evaluation
• Initial Evaluation Planning Form/Logic Model • Description of data collection activities, including sampling strategies • What, if any, collaborations were necessary to conduct evaluation activities? What changes, if any, occurred in the initial plan?
Outcomes/Results
• What was found for each of the key outcomes? • How do these outcomes compare to projected outcomes outlined on the Evaluation Planning Form?
Conclusions/Recommendations
• What have been the primary successes? • What have been the primary challenges/obstacles? • What changes/additions are needed to make the program work better?

The final question is typically shared in the evaluation report as "Recommendations." The fact that there are recommendations for improved services or performance is a good thing. It is evidence that the evaluation has, in fact, been useful to program stakeholders. Evaluation recommendations, however, are not the same as in-depth program recommendations. While the evaluation should yield information about areas where a program might need improvement, it probably has not collected the information sufficient for recommending one program option over another.

Examples

The above discussion of choices for evaluation reports suggests that there is no one "right" answer to "how to" compile the report. The examples included here indicate how findings might be presented in a formal, written final evaluation report. This format is a deliberate choice, chosen because all of the other formats can be derived from this information.

These examples will refer to the sample Evaluation Planning Form/Logic Model used in Chapters 2 and 4. They will be based on the sample data summaries presented in Chapter 4. For purposes of demonstrating how evaluation findings might be reported, those data will be used as though they were summary data. Though the numbers would most likely be much larger in a final evaluation report, how a K-12 International Outreach Program might talk/write about the data would be similar.

Throughout the specific examples, general principles of preparing evaluation reports will be highlighted. Those principles can be used to guide the preparation of the final report, regardless of the data sources or the findings.

<u>Example 1:</u>

Once again, the K-12 International Outreach Program can return to the Expanded Evaluation Planning Form/Logic Model for guidance on what to include in the evaluation report. On that form, the first goal was as follows

			MONITORING ACTIVITIES	**EVALUATING OUTCOMES**	
Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**	**Evidence of Results**	**Accomplish-ments**
"To what extent, if at all, did the program enhance students' and teachers' understanding of different cultures?"	Provided cultural presentations at 30 schools per semester	Increase cultural presenta-tions to at least 400 students in the school district	Database of school visits for the year Student feedback forms Teacher feedback forms	Database of school visits Previous year's Accomplish-ment Report Results of student, teacher, & presenter feedback forms	

This form can be included in the evaluation report, serving as the outline and the advanced organizer for the narrative about that particular goal. As listed earlier, the typical report begins with a brief description of the program, the populations served, and the numbers served. This is followed by an overall introduction to the evaluation—purpose(s), instruments, sampling strategies, etc.

At that point, the evaluation report might be organized by goals, which have now been turned into questions. Each question would be followed by the summary of the quantitative and qualitative data gathered. The data summaries (e.g., tables, graphs, etc.) are introduced and explained in the text of the report. Interpretations of those summaries also might be included. The section of the report on Goal 1 might read (sample report text appears in italics):

> *"To what extent, if at all, did the program enhance students' understanding of different cultures?"*

The first goal selected for the evaluation was to "Enhance K-12 students' and teachers' understanding of different cultures." To accomplish this goal, program staff planned to present outreach programs at 30 schools per semester during the 2005-06 school year. Through those presentations, the program hoped to increase the number of cultural presentations to at least 400 students in the school district and anticipated that 80% of students and teachers will report increased knowledge of international culture.

Student survey data collected supported the finding that students' understanding of different cultures was achieved. The database records demonstrated that 46 individual school visits were made to 10 different schools in the district. A total of 481 students attended programs this year. Those data are shown below in Table 5.2.

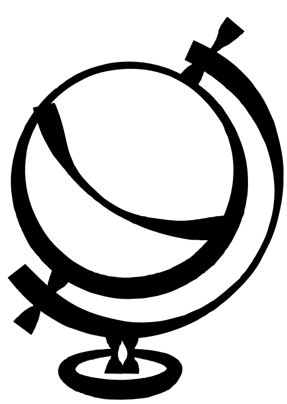


Table 5.2: Overview of 2005-06 Presentations

<table>
<tr><th>School Name</th><th># Presentations</th><th># Students</th><th></th></tr>
<tr><td>1. Kelly Elementary School</td><td>3</td><td>40</td><td rowspan="3">129 elementary students</td></tr>
<tr><td>2. Green Elementary School</td><td>3</td><td>45</td></tr>
<tr><td>3. Forrest Elementary School</td><td>3</td><td>44</td></tr>
<tr><td>4. Wheeler Middle School</td><td>2</td><td>50</td><td rowspan="4">198 Middle students</td></tr>
<tr><td>5. O'Grady Middle School</td><td>2</td><td>61</td></tr>
<tr><td>6. Franklin Middle School</td><td>2</td><td>35</td></tr>
<tr><td>7. Spencer Middle School</td><td>3</td><td>52</td></tr>
<tr><td>8. Reeves High School</td><td>2</td><td>60</td><td rowspan="3">154 HS students</td></tr>
<tr><td>9. Turner High School</td><td>2</td><td>40</td></tr>
<tr><td>10. Albert High School</td><td>2</td><td>54</td></tr>
<tr><td>Total</td><td>46</td><td>481</td><td>481</td></tr>
</table>

Student Feedback forms demonstrated that students' understanding of different cultures was enhanced as a result of those visits. For example, 129 elementary students completed feedback forms. [NOTE: the "real" numbers would certainly be much larger; the survey summary from Chapter 4 is used here as an example of what might appear in the report.] *Interpreting "excellent" and "good" as positive responses on the survey, Table 5.3 reports survey results on a 4-point Likert scale of "excellent" to "poor." Clearly, responses were overwhelmingly positive. For instance, 98% of elementary students rated the talk as either "excellent" or "good." There were similar responses to all questions.*

100% liked the way the speaker worked with the class
98% liked the talk
95% rated speaker understanding of the subject positively
94% reported understanding the talk

Table 5.3 Sample Elementary Student Survey Summary

K-12 International Outreach Program
2005-06

	 Excellent	 Good	 Fair	 Poor	N	M (4=Exc)	SD
1. Today's talk was:	91	35	3	0	129	3.7	0.5
2. The speaker's understanding of the subject was:	81	41	6	1	129	3.6	0.6
3. The speaker's way of working with my class was:	101	26	0	0	127	3.8	0.4

	 Yes	 No	N
4. Did you like the talk?	125	2	127
5. Did you understand the talk?	118	7	125

Clearly, the students had positive responses to the presenters and the talks provided on the school visits. Responses to open-ended student feedback form questions further elaborates how the talks did, in fact, enhance students' understanding of other cultures.

Each elementary student feedback form contained four open-ended questions. To analyze the qualitative responses to these questions, a random sample of 20 of the 129 surveys was selected. [NOTE: Again, the sample size would be larger with a larger number of surveys.] *Program staff reviewed all of the surveys to confirm that the random sample was representative of the total surveys received.*

For each question, a series of 3-5 categories or themes emerged from the analysis of the responses. These themes were validated by program staff who reviewed both the responses and the analyses. Two of those questions (# 6 and #8) specifically address the goal of enhanced understanding of other cultures. The themes for each of those questions are listed below:

6. What was best about the talk?

- *Information about cultural symbols and practices (11 responses)*
- *Discussions with questions & personal connections (7responses)*
- *Information about natural sciences/geography (2 responses)*

8. What did you learn from the talk?

- *Xxxxxxx*
- *Xxxxxxxx*
- *Xxxxxxx*
- *Other*

…Etc. The report would go on to summarize the results from other information collected that was relevant to the outcome, including responses from secondary student and teacher feedback forms. The final section for this evaluation question might also include a summary table comparing responses by stakeholder for similar questions.

Several key things to remember are demonstrated in the sample above. First, the evaluation report includes a summary of the data collected rather than the actual data. Even the summaries can get long when summaries from five groups are reported. To include all the actual data would make the report cumbersome for even the most interested audience.

To include all the actual data would make the report cumbersome for even the most interested audience.

Second, look back at the sample Table 5.3: Summary of Elementary Student Survey Data. That table is narrated, or explained, BEFORE the table appears in the text. The purpose of that narration in the text is to guide the audience as they look at the table. The narration points out noteworthy information and helps them interpret what the table means. In this particular case, the preceding paragraph tells the audience how the evaluator interpreted "positive" on the Likert scale, explaining both how the data were analyzed and what the "positive" responses were for each question.

> The narrative tells the audience how the sample was selected and that the sample was found representative of the whole set of responses.

Third, look back at how the open-ended questions were introduced. The narrative tells the audience how the sample was selected and that the sample was found representative of the whole set of responses. It informs the reader that a content analysis of that sample was performed and checked. What the audience *sees* in the report is a summary of the themes or categories for each question, with the numbers of responses for each. Examples of comments for each theme could be included, if desired or deemed necessary to better understand the themes.

Overall, what does this example show? It shows the Accomplishments for Goal #1. By turning the goal into a question and then answering that question, the report demonstrates that the K-12 International Outreach Program did, in fact, enhance K-12 students' understanding of different cultures.

The report demonstrates that the interplay required between the data summaries and narration of those summaries. Remember, though, that the program must have the actual data and the data analyses that support statements made about the program in the report. Having that information available in a technical report is essential; sharing all of it in the report is not!

Example 2:

Example 1 can be used as a guideline for how the K-12 International Outreach Program might share findings in the final evaluation report. The author of the report would proceed through all of the goals established for the evaluation. Under each goal (translated into a question), the monitoring and outcome evidence summaries would be shared, both in narrative form and as tables or charts. As appropriate, interpretations and recommendations can be addressed by question as well as in the summary of the entire report.

Example 2 will provide an abbreviated sample of how focus group data might be treated. The process is very similar to the treatment of open-ended comments on surveys, except that focus group comments are often more complex.

Again, the report author would go back to the Evaluation Planning Form, adding the 6th column for "Accomplishments."

			MONITORING ACTIVITIES	EVALUATING OUTCOMES	
Goals and Objectives	**Activities**	**Outcomes**	**Evidence of Activities & Quality**	**Evidence of Results**	**Accomplish-ments**
Assist K-12 teachers in providing accurate cultural information to students	Develop and provide materials and information to teachers Provide opportunities for teachers to ask questions of presenters	Teachers will report increased access to accurate information about other cultures Teachers will report enhanced interactions with people from other cultures	Copies of materials provided to teachers Database records of requests for presenters or information	Results from teacher feedback forms Summaries from teacher focus groups	

In this case, the question derived from the goal would be, *"How, if at all, did the program assist teachers in providing accurate cultural information to students?"* To answer this question, the evaluation has specified four data sources, two to monitor activities and two to provide evidence about outcomes. Summaries for materials provided, database records, and teacher feedback form results would be treated much as in Example 1—a combination of narrative explaining the summaries combined with tables and/or charts that further illuminate the data.

This example will demonstrate how the summaries from teacher focus groups might be treated in the evaluation report. Again, the "constructed" focus group summaries used in Chapter 4 will serve as the data. The report might read (again, sample report text appears in italics):

The fourth goal selected for the evaluation was to "Assist K-12 teachers in providing accurate cultural information to students." To accomplish this goal, program staff planned to develop and provide materials and information to teachers and provide opportunities for teachers to ask questions of presenters. Through those activities, the program hoped that teachers would: 1) report increased access to accurate information about other cultures and 2) report enhanced interactions *with people from other cultures.*

For the evaluation, that goal became question #4: "How, if at all, did the program assist teachers in providing accurate cultural information to students?" To answer that question, program staff kept copies of materials provided to teachers (such as fliers, maps, posters and other instructional materials) and kept database records of requests for presenters or for information. In addition, results from teacher feedback forms and teacher focus groups were collected.

[…here the report would summarize the monitoring data and the teacher feedback forms, as in Example 1.]

A teacher focus group also was conducted to help determine teacher perspectives on the program in general and their own learning in particular. A focus group was conducted during April 2006 in a university conference room. A purposive sample of 18 teachers volunteered to participate. Those teachers represented 8 of the 10 individual schools where presentations were made. The teachers represented all the elementary grades except kindergarten.

The teacher focus group protocol (see Appendix Z) consisted of six questions designed to elicit teacher perspective on the K-12 International Outreach Program. The facilitator explained the purpose of the group and reviewed the procedures to be used. The teachers appeared comfortable in the setting and willingly answered the questions. All 18 completed the preliminary outcomes survey and participated at some point in the discussion.

For each question, the comments were transcribed by the facilitator's assistant and later checked against the audio-tape of the session for accuracy. A content analysis was then conducted for the responses to each question. When categories had been established, they were re-checked against the responses to be sure that all answers "fit" one of the categories that emerged.

[…here the report would go through the content analyses for Questions 1-4, similar to the example below for Question 5]

Question 5 asked, "What do you think are the most important purposes of K-12 international programs?" All 18 teachers responded to this question. Content analysis of those responses yielded three categories, plus an "other" category. As Table 5.4 below indicates, 9 teachers saw a primary purpose of the program as increasing factual knowledge of other cultures. Other purposes revolved around increasing awareness and understanding of other cultures (N=6) and providing opportunities to interact with people from other cultures (N=5).

Note that in the summary table below, there are more responses (22) than original answers to the question (18). This is because some answers were coded in *more than one way.*

Table 5.4: Content analysis of Question 5, Teacher Focus Group

Category	*N*	*Examples*
Factual knowledge of other cultures	*9*	*Learn, provide information, educate*
Awareness & understanding of other cultures	*6*	*Student awareness, cultural understanding*
Interaction with others	*5*	*Interact, expose, introduce*
Other	*2*	*Language, presenter benefits*
	22	

[…repeat the process for Question 6. Another possibility for all six questions would be to list the categories. Under each category, several representative responses could be listed (as bullets) that would give the reader a "flavor" of the answers.]

The content analyses of the six teacher focus group questions reveal that elementary teachers report that the K-12 International Outreach Program serves several purposes. They report that a primary purpose is to help students learn facts and information about other cultures. When they talked about teacher learning, they talked about themselves as well as the presenters. From those comments, it appears that teachers believe the program has increased their ability to present accurate information about other cultures. It is clear that they have not only had access to people from other cultures, but they have appreciated having it.

Thus, the teacher focus group adds additional support to the finding that the K-12 International Outreach Program has, indeed, accomplished the outcomes specified for Goal #4. Combined with the results from the teacher feedback forms, it is clear that teachers and their students have benefited by having accurate information about other cultures.

As stated earlier, treatment of focus group data is not unlike the treatment of open-ended responses on the feedback forms. With both, but especially with focus group responses, remember that fewer categories make narration easier. If, in the process of writing the evaluation report, it seems that there are too many categories, it is possible (even recommended) to further analyze them to see if they can be grouped under some larger theme or "umbrella" category.

With the entire evaluation report, the overall purpose is to summarize evidence so that the intended audience can make sense of the information. That requires good planning, good data collection, good data summary, and good data analysis. Even with all that, a good evaluation report still requires a well-organized and well-written presentation of the findings to make it accessible and useable by the stakeholders.

Using Evaluation Data

Throughout the evaluation process the goal has been the same: To provide useful information about the K-12 International Outreach Program to interested stakeholders. Choices about sharing the evaluation findings center around that same goal. In the end, those findings should be shared in ways that will best help stakeholders USE the results to improve the program.

Those results will likely identify what the K-12 International Outreach Program is doing well. Celebrate those accomplishments! Those findings will likely also reveal places where improvements can be made or even suggest new directions. Celebrate those findings as well and use them to become better!

References

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APPENDIX A

Glossary of Evaluation Acronyms and Terms

Anonymity – An ethical standard where responses to evaluation instruments or tools (e.g., surveys, focus groups, etc.) cannot be traced back to any individual or organization. Ensuring anonymity often increases the honesty of participants' responses.

APA – American Psychological Association.

Archival Research – The collection of information using historical documents (e.g., newspapers, school records, medical files, government reports, organizational memos, etc.).

Assessment – The act of determining where a person stands on a characteristic of interest such as a behavior, ability, belief, aptitude, etc.

Bias – Any element introduced into the process of collecting and/or analyzing evaluation data that reduces the validity of the data (e.g., how instrument questions are asked, characteristics of the person administering the tool, etc.).

Case Study – A data collection method that uses multiple, often qualitative methods to create a "portrait" and provide a thorough understanding of the program, case, or object of interest.

Checklist – An instrument that specifies criteria denoting the presence or absence of attributes, characteristics, behaviors, etc.

CIPP Model – Corresponding to the letters in the acronym CIPP, this model's core parts are Context, Input, Process, and Product evaluation. In general, these four parts of an evaluation respectively ask: What needs to be done? How should it be done? Is it being done? Did it succeed?

Cluster Sampling – A sampling procedure used in situations where it is easier or necessary to sample groups from a target population instead of individuals. For example, it is often easier or necessary in educational research to sample classrooms as opposed to individual students. Clusters can be selected using simple random sampling, stratified random sampling, etc.

Collaborative Evaluation – Collaborative evaluation is an evaluation approach that engages program stakeholders actively in the evaluation process.

Confidentiality – An ethical standard ensuring that participants' information will not be shared with agencies or persons that do not have the participants' permission to access their information.

Content Analysis – A method for analyzing, describing, and summarizing themes in written documents such as minutes of meetings, case studies, interviews, focus group discussions, etc. This analysis can be quantitative, qualitative, or both.

Convenience Sampling - A non-random sampling procedure where the sample is chosen because it suits the purpose of the study and is convenient. Often researchers are forced to select a convenience sample if they want to conduct the study.

Convincing Evidence – The level of proof or evidence required to support a notion or claim.

Crosswalk – An evaluation planning tool used to insure that evaluation questions are answered with evidence from more than one data collection method (O'Sullivan, 1991).

Data – Material gathered during the course of an evaluation that provides information about the persons or objects of interest.

Data Collection Plan – A strategy or systematic process for collecting information; includes the type of information to be collected, how it will be collected, who will collect it, when it will be collected, and from whom or where it will be collected.

Data Source – Where the data comes from (e.g., archival documents, assessments, instruments, etc.).

Documentation – The process used to record the information that is collected.

ERIC – Educational Research Information Clearinghouse.

Environmental Scan – A technique that is often employed in a planning process. Before an organization develops their vision or goals, they often assess the environment to identify economic, social, and political trends and events that may impact the organization.

Evaluation – A method of determining an object's value (worth or merit), quality, utility, effectiveness, or significance in relation to pre-determined criteria and/or objectives. Types of evaluation include but are not limited to: collaborative, participatory, empowerment, etc.

Evaluation Design/Plan – A plan or design for conducting an evaluation that outlines activities such as data collection, reporting, questions to be addressed or investigated, analysis plan, management plan, cost, and feedback plan.

Evaluation Tool – An instrument that allows one to gather data or information for the purpose of evaluating an activity, program, person, etc. (e.g., survey, checklist, focus group protocol, assessment, etc.).

Experimental Method – Comparison of two or more groups where one or more groups has been exposed to an intervention and at least one has not. The groups are then compared to see if their outcomes are different and if that difference can be attributed to the intervention.

External Evaluator – Evaluators who are not associated with or employed by the organization that oversees the program being evaluated.

Feedback Loop – The process by which the results of the evaluation are used to enhance and/or inform decisions about existing programs or to develop new programs.

Focus Groups – A method of group interviewing where information is obtained through guided interaction among focus group members.

Formative Evaluation – A type of evaluation designed to provide program staff information that will help improve the program.

Gantt Chart – A project or evaluation planning tool that can be used to represent the timing of tasks required to complete the project/evaluation.

GAO – General Accounting Office.

Impact Evaluation – Evaluation that emphasizes how a program affects the community within which it exists. It looks at the ultimate long-term outcome of the program (e.g., how the social, economic, political, and/or psychological milieu of a community or residents may have changed as a result of that program or activity).

Internal Evaluator – Evaluators who are employees of the organization that is overseeing the program being evaluated.

Item – Usually refers to a test or survey question or statement requiring a response by the participant.

LOI – Letter of Intent.

Likert-Scale Items – Items used to measure attitudes, beliefs, feelings, etc. Responses are made on a "strongly disagree – strongly agree" continuum.

Logic Model – A systematic plan for developing questions and assessing outcomes associated with activities and objectives.

Long-term Outcome – Often referred to as a goal or impact, a long-term outcome is what a program, activity, or intervention hopes to change in the target population after the implementation of the program, activity, or intervention.

Measure – A specific, observable element of an abstract idea.

MOU – Memorandum of Understanding.

Monitoring – The act of tracking the behavior or progress of a program, project, individual, etc.

Needs Assessment – A systematic exploration of the needs, wants, market preferences, values, or ideals that might be relevant to a program or organization.

Objective – The goal of an evaluation or program.

Observation – A method of collecting information about what people do by watching their behavior.

Outcome – Result of an activity or what you expect to happen – the target goal. For example, not "12 mothers completed the program," but "mothers have increased knowledge of pre-natal care."

Outcome Evaluation – An evaluation that focuses on the immediate intended effects (i.e., short-term outcomes) of the program.

Outputs (Service statistics) - Units of service or product units (e.g., how many, how often, over what duration), quality of effort (e.g., how well), and measures of client satisfaction. See service statistics.

Participant Observation – A way of collecting data about a person's behavior by observing them during activities/events in which both you and the person of interest are participants (e.g., attending a city council meeting as a community member and an observer collecting data).

Participatory Evaluation – A type of evaluation where the evaluator works closely with program staff and stakeholders to design evaluation questions and plans, analyze outcomes, and apply findings.

Performance Measures (Goals, Objectives, Interim Outcomes, Long-term Outcomes) - Measures of change, improvement, and/or enhancement (e.g., assessment scores, rates of change, pre/post comparisons, etc.).

Performance Target – A translation of a performance measure into a specific numeric goal.

Pilot Test – To test an evaluation tool or instrument by administering it to a group of individuals similar to those in the target population in order to get information about its validity, reliability, and appropriateness.

Policy Indicators - A neighborhood, region, city, county, state, or national level measure used to demonstrate progress toward a desired outcome.

Practical Significance – The degree to which statistical significance represents a meaningful difference.

Process Evaluation – An evaluation that focuses on how an organization works, who is involved, and the type, frequency, and duration of program activities. Evaluation questions associated with this type of evaluation include: Who? What? Where? When? How?

Program Evaluation – A systematic collection of information about how a program operates and the effects it has on the target population and/or other questions of interest.

Program Evaluation and Review Technique (PERT) – A planning technique that is used to identify the activities to be accomplished, the order in which they need to be accomplished, and the estimated time to accomplish each activity, in order to complete a study on schedule.

Program Theory – A statement describing how all activities associated with a program will lead to the intended short and long-term outcome of the program.

Protocol – A standard procedure for conducting an activity such as an interview, site visit, focus group, etc.

Purposeful Sampling – A process of selecting cases or individuals that is likely to be "information-rich" with respect to the purpose of the study.

Purposive Sampling - Here the selection is made by human choice rather than at random, and the method suffers in that no sampling theory is possible (e.g., sample consists of volunteers or test town chosen for convenience in market research.)

Qualitative Data – Data that is narrative or text format and cannot be represented numerically.

Qualitative Methods – Ways of gathering qualitative data (e.g., narrative research, ethnography, etc.)

Quantitative Methods – Ways of gathering quantitative data (e.g., correlational studies, experimental studies, etc.)

Quantitative Data – Data that can be counted.

Random Sample – A method of drawing people or items from a larger group in such a way that every individual or item has an equal chance of being selected.

Reliability – The extent to which an evaluation tool gives the same results when administered at another time.

RFP – Request for Proposal.

Rubric – A formative and/or summative tool that provides a uniform set of precisely defined criteria; guidelines for assessing the quality of something.

Sample – A subset of a target group or population.

Sampling – A method of selecting a portion (e.g., sample) of the target population for study. Can be purposeful, stratified, random, simple, cluster, convenient, etc.

Service Statistics (Outputs) - Units of service or product units (e.g., how many, how often, over what duration, etc.), quality of effort (e.g., how well), and measures of client satisfaction. See outputs.

Simple Random Sample – A sample selected from a population by a process that provides every sample of a given size an equal possibility of being selected.

Snowball Sampling – A non-random sampling method whereby one or more respondents are interviewed/surveyed and then asked to identify other people who they think should be interviewed or surveyed.

Stakeholder – An individual who may be affected by the program being evaluated or by the findings of the evaluation.

Statistical Significance – Also referred to as **significance,** the degree to which something occurs above and beyond what is expected by chance.

Stratified Sampling – A sampling method often used when one is worried that a certain characteristic of individuals in the target group might be underrepresented in a sample. Individuals are first separated on the basis of that characteristic and then selected to ensure that the distribution of that characteristic in the sample mirrors the distribution in the population. The proportion of each subgroup in the sample may be the same as their proportion in the population, although this is not required.

Summative Evaluation – An evaluation that provides information about the worth, results, benefits, etc. of a program; often used when determining outcomes, results, whether to continue or expand the program, etc.

Survey – A method of collecting information by using a questionnaire composed of questions.

Systematic Sampling – A sampling method where the group of individuals is obtained by taking every "nth" individual from a list containing the defined population. When using systematic sampling one needs to be careful that the list is not already ordered or periodic in nature (e.g., alphabetical, etc.)

Target Population – A particular population, individuals, etc. designated to receive program activities.

Triangulation – The use of multiple sources and/or methods to compare and reinforce findings or results.

Validity – The degree to which an evaluation tool measures what it is intended to measure.

Variable – A characteristic that can take on different values.

APPENDIX B

Evaluation Web Resources

Evaluation, Assessment, and Policy Connections (EvAP)
http://www.unc.edu/depts/ed/evap/

Program Evaluation Guides and Handbooks

National Science Foundation User-Friendly Handbook for Mixed method Evaluations. (NSF)
http://www.ehr.nsf.gov/EHR/REC/pubs/NSF97-153/START.HTM

National Science Foundation User-Friendly Handbook for Project Evaluation: Science, Mathematics, Engineering, and Technology Education. (NSF)
http://www.nsf.gov/pubs/2002/nsf02057/start.htm

Basic Guide to Program Evaluation. (Management Assistance Program for Nonprofits)
http://www.mapnp.org/library/evaluatn/fnl_eval.htm

Basic Guide to Program Evaluation for Nonprofit Organizations with Very Limited Resources. (Management Assistance Program for Nonprofits)
http://www.mapnp.org/library/evaluatn/outcomes.htm

W.K. Kellogg Foundation Evaluation Handbook. (W. K. Kellogg Foundation)
http://www.wkkf.org/pubs/Tools/Evaluation/
Pub770.pdf#search=%22Evaluation%20Handbook%22

W. K. Kellogg Logic Model Development Guide. (W. K. Kellogg Foundation)
http://www.wkkf.org/Pubs/Tools/Evaluation/Pub3669.pdf#search=%22logic%20model%22

Evaluation Assistance. (Project Star)
http://www.projectstar.org/star/AmeriCorps/ea_home.htm

Taking Stock – A Practical Guide to Evaluating Your Own Programs. (Horizon Research, Inc.)
http://www.horizon-research.com/publications/stock.pdf

Evaluation Guidebook. (Urban Institute)
http://www.urban.org/crime/evalguide.html

Outcome Measurement Resource Network. (United Way)
http://national.unitedway.org/outcomes/

Data Collection Methods

What is a Survey? (American Statistical Association)
http://www.amstat.org/sections/srms/whatsurvey.html

Qualitative Methods: Impact Evaluation. (The World Bank Group)
http://www.worldbank.org/poverty/impact/methods/datacoll.htm#qualitative

Finding Evaluation Tools

Western Michigan University Checklist Project. (The Evaluation Institute)
http://www.wmich.edu/evalctr/checklists/

American Psychological Association.
http://www.apa.org/science/faq-findtests.html

Educational Research Information Clearinghouse (ERIC).
http://www.eduref.org/cgi-bin/res.cgi/Evaluation

Buros Institute of Mental Measurements.
http://www.unl.edu/buros

Data Analysis

Using Excel for Evaluation Data
http://www.metrokc.gov/health/APU/healthed/emanual.htm

Remark
http://www.principiaproducts.com

NVivo
http://www.qsrinternational.com/products/productoverview/NVivo_7.htm

Atlas-ti
http://www.atlasti.com/

SPSS
http://www.spss.com

Reporting and Presentations

American Psychological Association.
http://www.apa.org

University of Wisconsin – Extension
http://www.uwex.edu/ces/pdande/resources/pdf/
Tipsheet14.pdf#search=%22evaluation%20reporting%22

Evaluation Training

EvAP
http://www.unc.edu/depts/ed/evap/

The Evaluation Center at Western Michigan University.
http://www.wmich.edu/evalctr/

The Evaluator's Institute.
http://www.evaluatorsinstitute.com

American Evaluation Association.
http://www.eval.org/training.asp

Evaluation and Educational Research Organizations

American Evaluation Association
http://www.eval.org

American Educational Research Association
http://www.aera.net

North Carolina Association for Research in Education
http://education.uncc.edu/ncare/

Eastern Educational Research Association
http://www.govst.edu/eera/index2.htm

Other Government Resources

General Accounting Office
http://www.gao.gov/

National Science Foundation
http://www.nsf.gov

National Center for Educational Statistics
http://www.nces.ed.gov/

Institute of Education Sciences
http://www.ed.gov/about/offices/list/ies/index.html?src=mr

National Census Bureau
http://www.census.gov

Finding External Evaluation Consultants

Getting and Working with Consultants. (Management Assistance Program for Nonprofits)
http://www.mapnp.org/library/staffing/outsrcng/consult/consult.htm

Resume Bank. (American Evaluation Association)
http://www.eval.org/find_an_evaluator/evaluator_search.asp

Directory of Evaluators. (The Evaluation Center)
http://ec.wmich.edu/evaldir/Evalmenu.htf

Additional Glossaries

http://www.socialresearchmethods.net/tutorial/tutorial.htm

http://courses.washington.edu/smartpsy/glossary.htm

http://ec.wmich.edu/glossary/

APPENDIX C

Microsoft© Excel "Cheat Sheet"

Developed by Janet McLendon
Carteret County Schools, North Carolina
www.carteretcountyschools.org/staffdev/howto/msoffice/**excel**/**excel**2000.doc

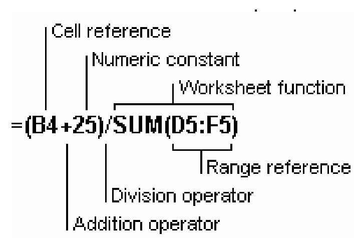
I. General Information and Vocabulary

Cell: You will be inputting data into what are called **cells.** Each cell has a name; the default cell when you open Excel is **A1** (First the **column** name and then the **row** name).

Column: The lettered gray area labeled A, B, C….

Formula: Formulas always begin with an equal sign. Formulas can perform mathematical operations, such as addition and multiplication, or they can compare worksheet values or join text. The following example adds 25 to the value in cell B4 and then divides the result by the sum of the values in cells D5, E5, and F5.

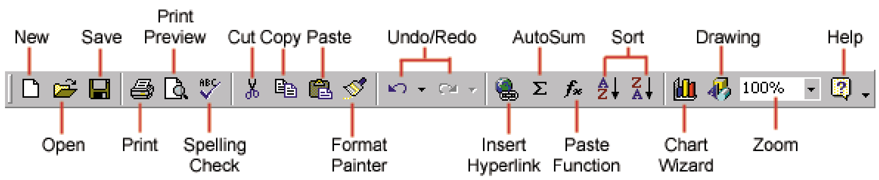
Formula bar: The bar near the top of the window that displays values and formulas used in the cell that is highlighted or active.



Graph/Chart: A picture created to help you recognize trends that are not obvious in a list of numbers. Some graph types are line, bar, area, and pie graphs.

Labels: Labels are located at the top of each column and to the left of each row that describe the data within the worksheet.

Menu:



Row: The numbered gray area named 1, 2, 3…

Sheet tabs: The names of the sheets appear on tabs at the bottom of the workbook window. To move from sheet to sheet, click the sheet tabs.

Spreadsheet: An application that can be used to do calculations, analyze and present data. It includes tools for organizing, managing, sorting and retrieving data and testing "what if " statements. It has a chart feature that displays numerical data as a graph.

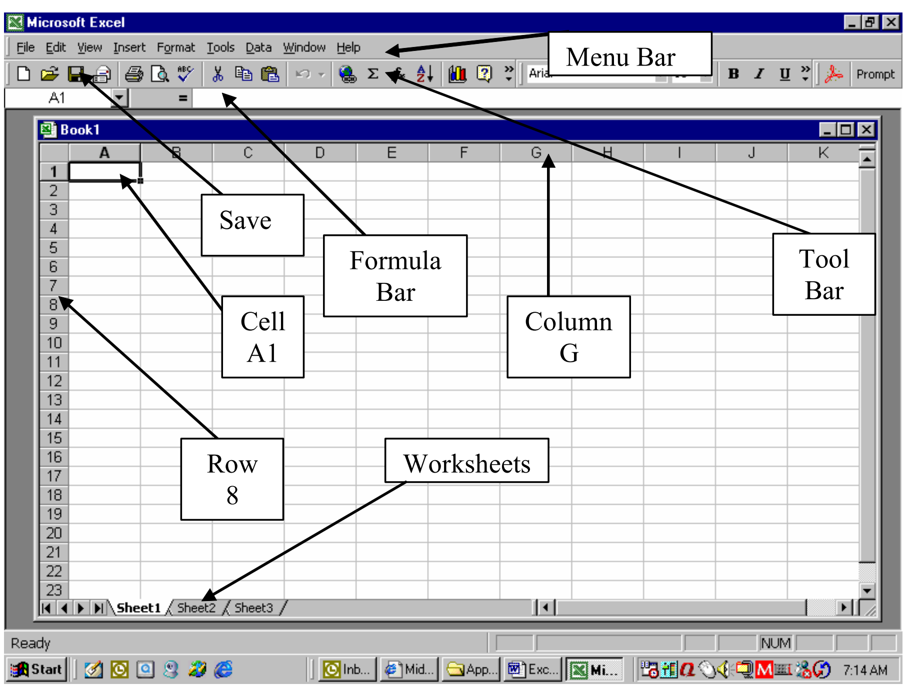
Value: The term for a number in a spreadsheet that can be added, subtracted, multiplied or divided.

Workbooks In Microsoft Excel, a workbook is the file in which you work and store your data. Because each workbook can contain many sheets, you can organize various kinds of related information in a single file.

NOTE: There is always more than one way to do any of the following steps in this document. For the sake of time, cost, and sanity, I am only going to show you one way.

II. Starting the Program

1. Go to **Start**
2. Click on **Programs**
3. Click on **Microsoft Excel**



III. Entering Information into a Cell.

1. Select the cell by clicking on it to make it active (a heavy line will be around the cell that is selected/active).
2. Type the data
3. **Press Enter** (You can edit data by clicking back on a cell and reentering the data).
4. **Ask me the different ways to move from cell to cell.**

IV. Changing the Page Layout from Portrait to Landscape

1. Go to **File**
2. Choose **Page Set up**
3. Make sure you are on the **Page** tab. If not, click on the **Page tab**
4. Click on the radio bullet beside **Landscape**
5. Click on **OK**

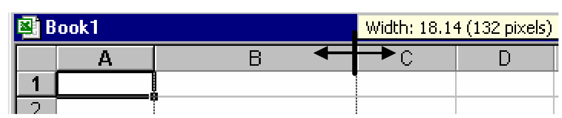
V. Saving a Spreadsheet

1. On the Toolbar find the icon that looks like a floppy disk
2. Click on the floppy disk icon (If you prefer, Go to File on the Menu Bar and then choose Save As… from the menu).
3. Go to **File**
4. Choose **Save As… or use the Save button on the menu bar**
5. Click on **OK** (at the **FoolProof Security System** window).
6. Use the pull down menu in the **Save As:** box
7. Choose **Sys on 'Lecar??' (F:)**
8. Double click on **Documents**
9. Double click on **your folder**
10. In the **File name:** box, enter the title of your document.
11. Click on **Save**

VI. Finding and Opening Your File

1. Double click on **My Computer**
2. Double click on **Sys on 'Lecar??' (F:)**
3. Double click on **Documents** folder
4. Locate **your file** folder
5. Double click on the file folder

VII. Edit Width of Column

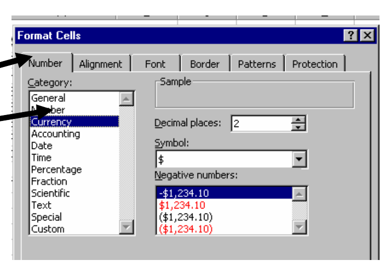


1. Click on one of the column letters
2. Move your mouse over the line between the two columns
3. Click and drag the column to the width you want.

VIII. Edit Height of the Row

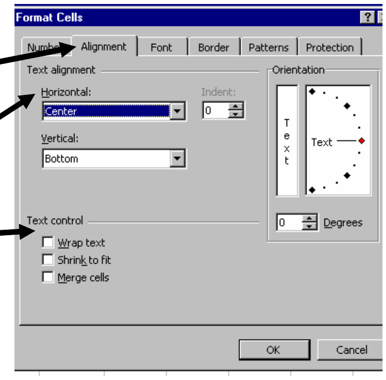
1. Click on one of the row numbers
2. Move your mouse over the line between the two rows
3. Click and drag the row to the height you want.

IX. Change Cell Format ($, % etc.)



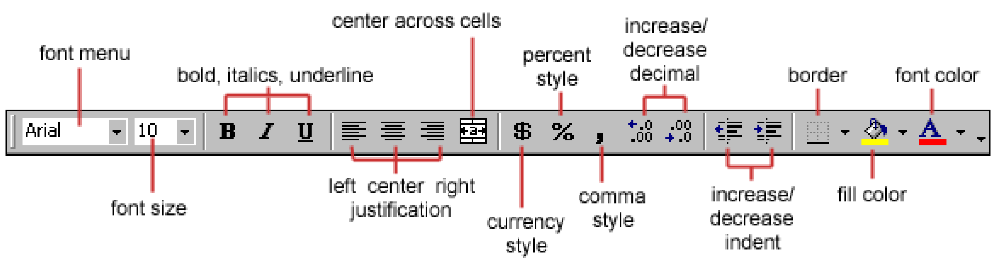
1. Select the cells you want to format
2. On the **Format** menu
3. Click **Cells**
4. Click the **Number** tab
5. Choose **Currency**
6. Click on **OK**

X. Format Cell Alignment
(left, right, center, and wrap)



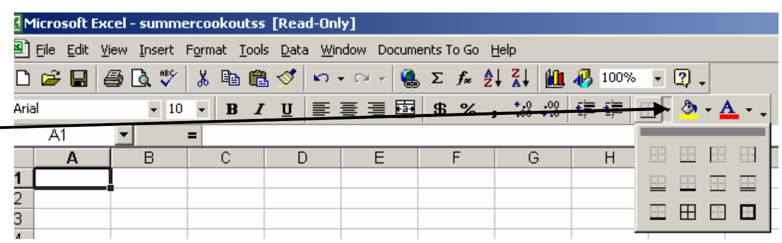
1. Select the cell or cells you want to align.
2. Right click on the cell(s) you want centered.
3. Choose **Format cells…**
4. Click on the **Alignment** tab
5. Change the information in the **Horizontal:** box from **General** to **Center**.
6. Click to check the **Wrap text** box.
7. Click on **OK**

XI. Other Formatting Tools



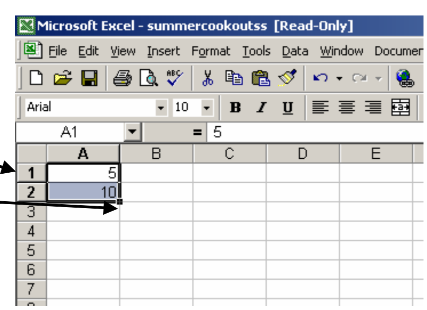
XII. Borders

1. Highlight the cells that you want to have a border around.
2. Click on the drop down **border** icon
3. Choose the border(s) you want around the cells.



XIII. Number Series

1. Enter a number in cell (see example)
2. Enter another number in the cell below or across
3. Select the two cells
4. Drag the fill handle to fill the series
5. AutoFill automatically fills in the rest of the series.



XIV. Sample Spreadsheet: Open the file called "Summer Cookouts"

Summer Cookout						
Food Item	**Quantity**	**Unit Price**	**Cost**		**Budget: >**	**$75.00**
100% Pure Ground Beef Patties (12 patties)	0	$5.97	$0.00			
Hamburger Rolls (8 ct)	0	$1.89	$0.00		**Balance: >**	**$75.00**
Home style Baked Beans (16 oz)	0	$0.99	$0.00			
Fresh Cole Slaw (lb)	0	$1.99	$0.00			
Potato Chips (13 oz)	0	$2.99	$0.00			
Soft Drinks	0	$0.75	$0.00			
Fresh 1/2 Sheet Cake	0	$19.99	$0.00			
Item Count>	**0**	**Subtotal:>**	**$0.00**		**# of Hosts**	
Pricing information was found on: http://www.lowesfood.com		**2% Sales Tax:>**	**$0.00**		**V**	**Cost for each host**
		Total:>	**$0.00**		2	**$0.00**

XV. Sample Formulas

Here are a few basic formulas we used in this staff development:

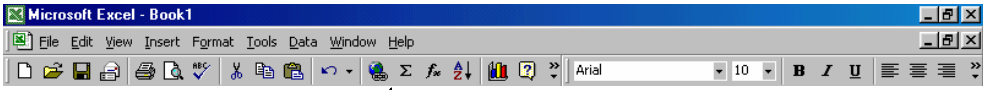
Find the sum of a series of numbers (Item Count)	Find the sum of a series of numbers. (Subtotal)	Find the sum of two numbers (Total)	Subtract (Balance)
=B3+B4+B5+B6+B7	=SUM (B3:B7)	=D10+D11	=G2-D12
Find the Average (Average cost of items)	Multiply the Quantity times the Unit Cost. (Cost)	Multiply .02 to find the 2% sales tax.) (Sales Tax)	Divide (Cost for each host)
=AVERAGE(D3:D9)	=B3*C3	=D10*0.02	=D12/F12

Note: All formulas begin with = sign and there are no spaces in a formula.

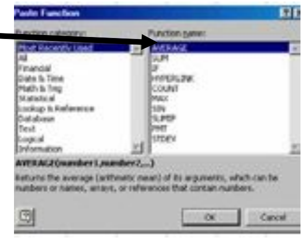
XVI. Enter a Formula Manually

1. Click on the cell where you want the formula to go
2. Enter the **=** sign into the Formula Bar
3. Choose one of the sample operations above.
4. Press **Enter**

XVII. Create a Formula Automatically

1. Click on the cell where you want the formula to go
2. Click on **Paste Function**
3. 

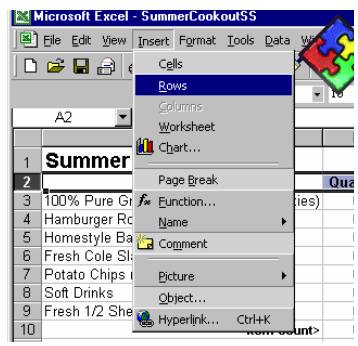
4. Choose the Function category and Function name: for the operation you want to perform. (Example: find the average)
5. Click on **OK** to select the function.
6. The next window allows you to choose the cells that will be included in the function.
7. Click on **OK**.



NOTE: Quick way to find the sum! Click on the cell where you want the formula to go. Click on the **Auto Sum** button. Check to make sure the cell you want to add are highlighted. Press the Enter key on the keyboard or click the green check mark button on the formula bar.

XVIII. Fill in a Series from a Formula

1. Select the first cell in the range you want to fill, and enter the starting formula for the series.
2. Select the cell that contains the starting formula.
3. Drag the fill handle over the range you want to fill.
4. To quickly fill in the active cell with the contents of the cell above it, press CTRL+D. To fill in the active cell with contents of the cell to the left, press CTRL+R



XIX. Insert Rows

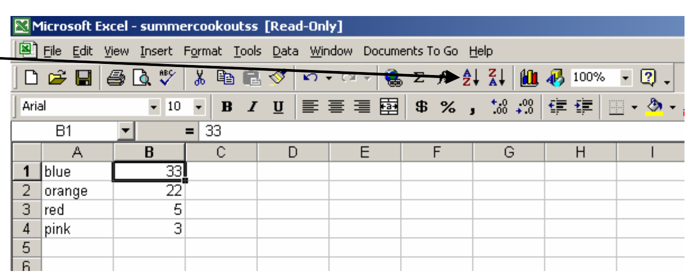
1. To insert a single row, click on the cell row where you want the new row. For example, to insert a new row above Row 2, click a cell in Row 2.
2. On the **Insert** menu
3. Click **Rows**
4. To insert multiple rows, select rows immediately below where you want the new rows. Select the same number of rows, as you want to insert.

XX. Insert Columns

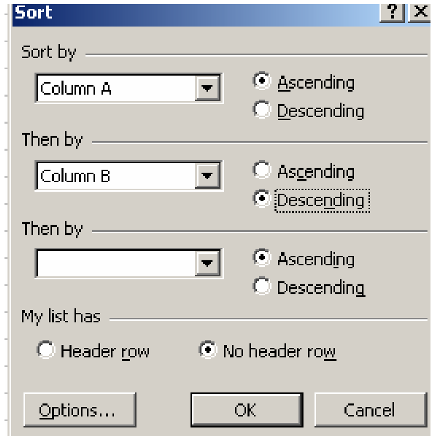
1. To insert a single column, click a cell column immediately to the right of where you want to insert the new column. For example, to insert a new column to the left of Column D, click a cell in Column D.
2. On the **Insert** menu,
3. Click **Columns**.
4. To insert multiple columns, select columns immediately to the right of where you want to insert the new columns. Select the same number of columns, as you want to insert.

XXI. Sort in Ascending/Descending Order

1. Highlight the first cell of the column you want to sort
2. Click the Sort **Ascending** or **Descending** icon

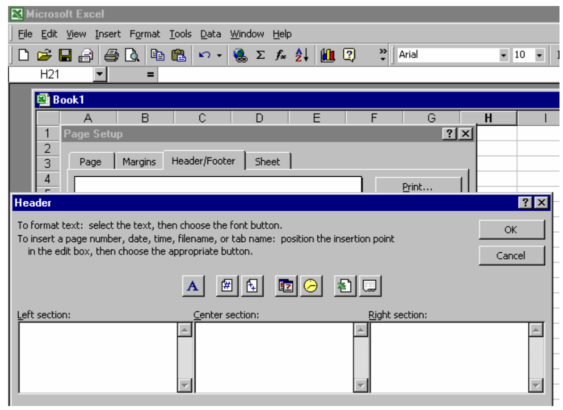


XXII. Sort Multiple Fields



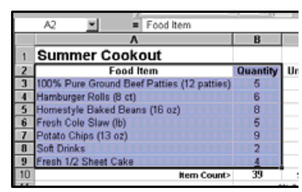
1. Click anywhere in the data
2. Go to **Data** in the menu bar
3. Go to **Sort by**
4. In the Sort dialog box, click the Sort by dropdown arrow
5. Select the field you want to sort.
6. Choose **Ascending** or **Descending**
7. For the second field to sort, click on **Then by**
8. Choose **Ascending** or **Descending**
9. Click on **OK**

XXIII. Create Custom Headers and Footers



1. On the **View** located on the menu bar
2. Click **Header and Footer**…
3. Click on **Custom Header** or **Custom Footer**
4. Choose **Left section**, **Center section** and/or **Right section** box to enter the information into your Header.
5. Click on **OK**
6. Click on **OK**

XXIV. Create a Chart



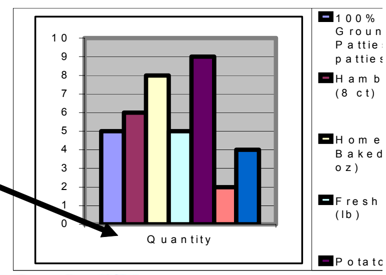
1. Select the cells that contain the data that you want to appear in the chart. ***NOTE: This is probably the step that most people forget to do and they can't figure out why they can't create a graph.***
2. Click **Chart Wizard** 
3. Choose **Chart Type (Column)**
4. Choose **Chart sub-type (Clustered Column)**
5. Click on **Next**

6. In the Chart Source Data screen, click on the **Data Range** tab and click on the **Columns** to **Rows** bullets to see different views. (See differences below using the same data)

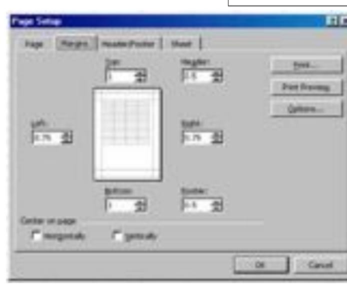
7. Click on **Next**
8. In the **Chart Options**, you can title your chart, name axis, label data, show grids, and even move the legend.
9. Choose embedded chart (places your chart on top of your spreadsheet) or create a chart sheet (hides your spreadsheet and just shows the chart).
10. Click on **Next**.
11. In the **Chart Location**, choose **As new sheet:** if the chart should be placed on a new, blank worksheet. Choose **As object in:** if the chart should be place on your spreadsheet document. The second option is great to show younger students how the graph adjusts when you change the numbers.

XXV. To Modify your chart

1. Place the cursor somewhere under the graph
2. Right click your mouse
3. Choose **Chart Options**.



XXVI. Set Margins Before you Print



1. Go to **File**
2. Choose **Page Setup**
3. Click on the **Margin** tab.
4. Adjust the margins to your specifications.
5. Click on **OK**

XXVIII. Print

1. Go to **File**
2. Choose **Print**
3. Make necessary changes to the **Page range**, **Copies** and whether they need to be collated.
4. **Emergency only!!** Pull down the **Name**: menu to choose a printer in a different location than where it is printing now. You should only do this when the printer you normally use is not working. PLEASE be sure to change the print back to the original location before leave the room.
5. Click on **OK**