

Workshop Session: Evaluator Network Meeting (Rest of State)

Facilitator: Jonathan Tunik, Senior Research Associate (MI)

Date: Wednesday 11/14/2018



Twenty-six local evaluators working (mostly) with RoS 21 CCLC grantees attended the Evaluator Network Meeting as part of the RoS Symposium. Objectives for the meeting were to: (1) **Identify** issues of interest or concern to local evaluators; (2) **Explore** relevant topics that are of interest to local evaluators as well as those that align with state priorities; and (3) **Learn** from experienced evaluators in the network and share best practices. The main topics discussed were the Evaluability Checklist, the AERs and AER Guide, the site monitoring process and staff turnover. Announcements and the main points from each discussion are summarized below.

Evaluability Process and Checklist

- **Changes:** The Evaluability Checklist is currently being revised; draft revisions will be distributed soon and will be reviewed by an advisory group of local evaluators. Changes will be primarily in format rather than content, so evaluators may begin completing the checklist using last year's version if they want to get started. For now it is assumed that the December 31st deadline will remain in effect. The checklists will be submitted to the Resource Centers instead of to NYSED. An advisory group of local evaluators will be formed to work with the State Evaluator on modifications of the process and checklist, which will then be submitted to NYSED for review. Several attendees requested to participate in the advisory group, and others were invited to contact MI if interested.
- **Content and Format:** A review of the language in the Checklist (as well as the description of the Evaluability Process in the evaluation manual) was requested: the "evaluability" label can be confusing, as even programs who are rated as "not ready to be evaluated" are still required to comply with all evaluation activities and reports, and evaluability would normally only need to be assessed in the first year. Revisions will emphasize the intended purpose of the process, as described last year by NYSED, to identify technical assistance needs rather than to function as a monitoring form. However, the changes are likely to be more in the packaging than in the content per se. Evaluators also suggested the form provide a way for programs to indicate the priority of requested areas of TA.

Some noted that the process overlaps with the QSA. Because the QSA is intended to be strictly internal, the two should not be combined. However, the QSA process can be used to inform the Evaluability process.

- **Timing:** For this year at least the deadline for submitting the Checklist will remain as 12/31. Concerns were expressed about meeting this deadline while the format is still under revision; the facilitator suggested that programs continue to use the old form to guide the focus of their advisory council meetings and documentation, since the changes will be primarily in format rather than content. The possibility of allowing for rolling submission of the Checklist – as TA needs arise – will also be explored. Some felt that it should only need to be submitted by programs who are requesting TA. This possibility will be explored but for now it is required for all programs.

Annual Evaluation Reports (AER) and Guide

- **Review process:** All AERs will be read either by MI and/or SED; MI will do a more in depth review of a selection of programs (20%). Like the program visits last spring, the purpose is not to evaluate individual programs/reports, but to identify trends; ultimately, it is to help program managers be better informed consumers of evaluation services.

- Usability: Evaluators found the AER Guide to be easy to follow, although they noted some redundancy (which will be addressed in the Year 2 Guide). The format was found to necessitate collaboration between the evaluator and program staff, which some found to help ensure buy-in; but it made it difficult to write the report in cases where program staff were not collaborative.
- Audience and Standardization: MI pointed out that standardization of reporting was necessary so that the State Evaluator can summarize for NYSED and NYSED can report up to USDOE. As with the NYC group, some concerns were raised about the difficulty of targeting the report to multiple audiences (which also include their local program stakeholders). Others suggested using alternate formats to inform local stakeholders, such as the executive summary, slide decks, a data dashboard or an evaluation newsletter.

Some participants felt that creating an online fillable reporting form would be helpful and would support standardization, but concerns were expressed that this would tend to limit responses or encourage copying and pasting from year to year. The facilitator suggested that some degree of copying and pasting is reasonable when information has not changed, as long as the report explicitly indicates what has or has not changed.

Monitoring and Technical Assistance

- Availability of TA: Program directors expressed a need for more information and guidance about what technical support is available through the Resource Centers – it was noted that in the past, Resource Centers advertised their services more. Concerns were expressed that the RCs (especially NYC) are currently short-staffed and might not be able to provide all the TA that is needed this year. The facilitator pointed out that the RCs always need to make decisions about prioritizing services, but that part of their support can be in the form of referring programs to other resources.
- Notification of monitoring: Participants requested more advanced notice if they would be receiving a monitoring visit, and suggested that the monitoring visit checklist should be distributed to all programs, not only those receiving visits, to help them remain compliant.

Staff Turnover

- Challenge to continuity: Some participants raised concerns that high levels of turnover among program staff are creating challenges to program support and continuity. Some suggested that the RCs might offer orientation to new program directors every year, while others noted that the idea of creating a Program Director Manual (analogous to the Evaluation Manual) had been suggested several years ago. Many agreed that such a document would be valuable, given that the needed information exists but is not all in one place. Participants agreed that creating such a document should be the responsibility of the Resource Centers, although a “wiki” approach could facilitate creating the document, and one evaluator volunteered to help start the process.
- Strategies: Other strategies that participants reported their programs using to maintain continuity included creating a set of detailed binders documenting their own program, keeping all key program documents in a shared Google drive, and cross-training program staff to create shared knowledge about key tasks.

Recommendations: The State Evaluators recommend that NYSED and/or the RCs...

- Distribute monitoring visit checklists to all programs as soon as possible;
- Circulate a summary of types of TA available from the RCs;
- Allow for a rolling submission process for submitting “TA Request” Checklists; and
- Consider developing a Program Director manual (with the help of a wiki process and/or local evaluators as available).

Session Attendance

Name	Firm
Emily Hagstrom	Via Evaluation
Jadaiman DaCosta	Via Evaluation
Rob Lillis	Evalumetrics Research
Lynn Cross	Contact Community Services
Karinda Shanes	Liverpool District
John Archacki	Hezel Associates
Mark Davies	Blupoint Conuslting
Rhonda Morren	Rochester CSD
Ken Fyfe	Geneve CSD
Pat Laino	Utica Schools CBO
Laurel Blyth Tague	Information Resources & Assoc.
Lynn Moulton	Brockport Research Inst. (BRI)
Kelly Masters	LPB/RED Group
Lucy Allchin	LPB/RED Group
Michael Fulton	HCSD
D.T. Spaulding	Gullie Consultants
K. Gullie	Gullie Consultants
Cynthia O'Connor	Apter & O'Conner Associates
Tracy Herman	BRI
Candace LaRue	OCB
Katherine Roberts	Interactive Health
Ellen Garcia	Interactive Health
Sarah M.	New Square Community Improvement Council
Danielle Campbell	L&G Research
Cynthia Flynn	BRI
Ana Maria Grigoras	L&G Research