

Toolkit for Evaluating Education Events

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Introduction

This Toolkit for Evaluating Educational Events can assist you in determining what elements of an educational event to evaluate and how to complete that evaluation. It is the second of a series of toolkits that provide practical guidance on delivering meaningful educational events for all staff. The first toolkit is entitled: Toolkit for Planning Education Events; both can be accessed online at [www.community-networks.ca](http://www.community-networks.ca) (type toolkit name into search box).

The series features a structured, easy-to-follow, multi-step process to guide anyone tasked with delivering a training or educational session for their organization. Each toolkit includes templates and samples. They are based on best practice in the field of adult education and the expertise of individuals with many years of experience in the design and delivery of educational events. This particular Toolkit provides guidance on how to develop an evaluation for your educational session that is realistic in scope and scale.

Who Is It For?

**Anyone!**

Need to evaluate an educational event at your organization? Not sure where to start? Perhaps one of the following situations applies to you:

* Someone just asked you to prove that your training program is improving staff performance and client outcomes.
* You were handed your boss’s favourite evaluation tool to capture feedback on a new high-profile workshop series.
* Your department head has told you that the CEO wants proof that your educational sessions are worth their budget allowance – you’ve heard that things are going to be tighter next year and s/he is looking for areas that can be trimmed.
* You received some specific funding to run an educational event and want to report back to the funder about the impact and to request additional funding to run it again.

How Does It Work?

Whatever your situation, just follow the steps in this toolkit and you can produce a high quality evaluation that can advance your participants’ learning outcomes and respond to your stakeholders` interests! A full set of templates is provided, as well as samples to show you how each step might look.

**Step 1:** [Determine the Evaluation’s Purpose](#step1)

**Step 2:** [Estimate Evaluation Resources](#step2)

**Step 3:** [Design the Evaluation Tool(s)](#step3)

**Step 4:** [Implement the Evaluation Tool(s)](#step4)

**Step 5:** [Analyze the Data](#step5)

**Step 6:** [Present the Results](#step6)

Step 1: Determine the Evaluation’s Purpose

To evaluate means to make a judgment about the amount, number or value of something. Who makes or influences that judgment of your educational event is of critical importance. People approach evaluation from different perspectives. For example, some people want to know:

* If participants like the training
* What knowledge or skills learners acquire
* The extent to which the training influences job performance
* How the training affects the organization’s productivity or client outcomes.

A Multi-stakeholder Approach

Stakeholders are individuals or groups who might influence or be affected by the session’s outcomes. A multi-stakeholder approach to evaluation provides useful information that various groups—including learners/participants, organizers, administrators, funders and supervisors—can use to support learning. The first step is to explore what the evaluation must accomplish, or its purpose.

Ask two questions:

* What is it that you and/or others want to know?
* What are you going to do with this information - what difference is it going to make?

Determining what you and others want to know

Each evaluation will be shaped by the purpose of the educational event and by what different people will want to know about the outcomes of the event. The table “Designing the Evaluation: What You and Others Want to Know” (see [Step 1 in Appendix A](#appAstep1)) includes a list of individuals or groups who might influence or be affected by the session’s outcomes (i.e. the stakeholders). The table provides a quick way to identify which stakeholders’ perspectives are important and what those stakeholders might want to know from the evaluation results. For example, stakeholders may want to know what happened during the educational event (in-session) or what happened when the participants tried to apply their learning back on-the-job (post-session). You can use the table to:

* Identify what parts of the session evaluation each stakeholder might be interested in (indicate with ✓), whether they are attending the session or not. For example, your CEO may want the evaluation results of a Board-funded session so that members can discuss other funding opportunities at their next Board meeting.
* Remember that not all stakeholders have an interest in all aspects of your educational events. For example:
  + The purpose of your educational event may focus on only one of the categories related to learning (e.g., to inform staff of new policies). Stakeholders may only be interested in evaluating participants’ understanding of those concepts and issues, the third column, and/or how they applied those back on-the-job, the two columns to the right.
  + You may be the only person interested in the results so you can plan your next educational event; for other sessions there may be others who have a stake in different aspects of the evaluation`s results.
* Find out who wants to know about what and then incorporate those interests into the tool design. Exercise your discretion when anticipating which session evaluations (or a collation of session evaluations) will be of most interest to which stakeholders.

You can use this table to launch your thinking about stakeholders and what they may want to understand from the evaluation. Some components will be more important than others so you won’t have entries in every box – no need to complete the entire chart. Once you are clear on the evaluation’s purpose, you can begin to craft the questions.

Identifying what you are going to do with this information – what difference it will make

For evaluation results to be meaningful, stakeholders have to identify what they plan to do with the information. This will also shape how the evaluation is designed. There are a variety of ways the evaluation results can be used. Ask yourself if you want to use your evaluation results to do any or all of the following:

* Increase participant satisfaction with the education event experience?
* Improve participant attitudes to education events?
* Enhance how the education events are conducted, how the activities are designed and how the educator leads the sessions?
* Increase the extent to which participants understand new concepts and issues, acquire new skills and translate their learning to on-the-job performance?
* Develop the organizational supports for professional development and/or continuing education?
* Track the number and type of educational events offered by a funder?
* Measure the impact of staff education events on client outcomes?
* Address emerging issues in the organization?

Be sure to communicate with the evaluation participants about what you will do with the results. For example, *“We will collate your responses and analyze those results for themes. A copy of this analysis will be included in a report to the Director of Client Services and to all participants”.*

Tips:

* Don’t ask questions if you know there is no opportunity or desire to act on the result of those questions in your organization. For example, some evaluators ask about the age and gender of the respondents but are not going to do anything with that data.
* If there is evidence about which your organization repeatedly inquires, be sure to include a question that will gather that data. For example, data related to a specific strategic priority such as “reaching beyond our sector”.
* Identify evaluation criteria early when designing instruction/ training. What you want as a learning outcome informs what and how you will design training.

Step 2: Estimate Evaluation Resources

Evaluation of workplace training and education can require a little or a lot of resources, depending on the interests of different stakeholders. Think about what funds, human resources (whether internal or external), technical resources and time you have at your disposal in order to complete the following tasks related to the session evaluation:

* Design the draft evaluation tool and methods; for example, questions for survey, interviews, focus groups, etc.
* Review with any interested stakeholders
* Finalize
* Produce in paper and/or electronic format
* Distribute to session participants or convene session participants
* Conduct any individual or group consultations
* Input, collate and analyze results
* Draft a report, finalize
* Present to interested stakeholders

Use the table “Evaluation Resources Budget” (see [Step 2 in Appendix A](#appAstep2)) to anticipate and budget for your requirements and constraints. You wouldn’t be the first person to become creative when costing out a frugal but credible evaluation process!

Step 3: Design the Evaluation Tool(s)

Whether using the outcomes-based approach to evaluation or other approaches, you can use the following general outline to set up the evaluation format. (1, adapted from p154).

Draft the Evaluation Format

**Introduction**

* Purpose: in the first sentence of the introduction, indicate why you are having an evaluation: what is the reason? (Be sure to tell learners at the beginning of the educational event whether there will be an evaluation; sometimes they will pay more attention.)
* Disclosure: indicate how results will be accessed. For example, in an “anonymous” evaluation, absolutely no one other than the participant has access to their results, as names are not recorded; in a “confidential” evaluation, the participant and the evaluator can access their own results, as names are recorded. Indicate if names may be recorded in the evaluator’s files over time in order to track changes in individual or group scores during future evaluations.
* Analysis: describe briefly how the results will be analyzed (see Step 5). For example, only the average of scores will be reported. Or, only themes or clusters of ideas will be identified.
* Distribution of results and follow-up: be clear about with whom the feedback will be shared and how it will be shared. Identify if the group and/or individual results of the evaluation be shared with the agency lead, with supervisors and/or with other participants. This could influence how participants respond.

**Focus of Questions**

* The questions focus on two areas, including a number of components in each area:
  + The experience of in-session learning during the educational event (concepts, issues and skills on which learners will be assessed; effectiveness of event participation, productivity, logistics, organization)
  + The experience of post-session performance back in the workplace (application of learning in on-the-job performance, support for on-the-job application of learning)
* The focus of questions is tailored according to the goals of each educational event.

**Closing**

* Thank you
* Directions for returning completed form, if necessary.

When drafting the format of the evaluation use the following tips to ensure the tool will provide you with the information you require to make decisions for future educational sessions in your organization.

Tips:

* Think about what methods have been used previously to gather evaluation information about your organization’s educational events and with what success. If your organization has used any standard templates, you may be able to adapt one to your needs.
* Identify the pros and cons of each evaluation method in your organization. For example, surveys may be most efficient but may produce a low response rate if people are suffering from survey fatigue; some approaches may be less affordable in terms of time and funding; you may capture more insights from a brief focus group than a long survey. Some educators regard the pre/post-test as the gold standard of evaluation for learning. It can be intensive and time consuming but can also identify what is really important for learners to achieve. For example, one group embarking on an “Ethics of Touch” training were asked the same 8 questions at the beginning of the program and then at the end. The overall results were compared to determine if an increase in knowledge would change service delivery. Instructors were also able to reflect on where participants missed certain points and think about a better way to present those ethical concepts next time.
* If your organization has a standard evaluation that they require, staff may feel compelled to have participants complete it (even though it is not giving the event organizers the information they need about the intended outcomes back-on-the-job). To compensate for deficient evaluation templates:
  + Add a short supplementary question(s) tailored to the specific information required. For example, ask open-ended questions if the mandated form is multiple choice or a Likert scale.
  + Include more specific questions as part of the Q/A at the end of the educational event while people are still in the room. You may not get answers from everyone but some answers may be better than none.
  + Make 10 minutes at the end for small group discussion that focuses on specific questions.  Working in teams may reduce the pressure of any one person to contribute and will also allow participants to learn from each other about how to inform their practice.
  + Give advance warning that a follow up email will be sent asking more specific information.
* When reviewing the overall draft design, whether paper or electronic, ensure it looks inviting so as to attract quality responses.
* Consider *when* the evaluation will happen in relation to the event agenda.
  + *Formative* evaluation contributes to a process while it is happening. If you have decided to ask some formative questions that will help you to shape the rest of the session’s agenda, when is it best to do this within mid-session?
  + *Summative* evaluation happens at the end of an event or after the event. At what point do you want to ask participants about what went well, what needs to be improved and what happens next: At the end of the session? One week later back on-the-job? One month later after new skills have been practised?
* Be realistic with your own knowledge about evaluation. If you require a more comprehensive approach, find someone who has more expertise.

Construct the Questions

Once you have drafted the evaluation format, you are ready to construct the questions. An outcomes-based approach in planning the education event can be helpful here. This approach involves identify key components that learners must experience in order to make a change in their work performance: understanding certain concepts and issues, mastering certain skills, demonstrating what they can do in-session and performing post-session on the job (see [Designing the Session, under Step 3 in Appendix A](#appAstep3a)). The “outcome” is what learners change in their work; it connects what they “know” with the “know-how” applied back on the job(2).

Use the [table provided below](#tablestep3) to identify evaluation questions for each of the outcomes-based approach components and what tool(s) you may be able use to ask those questions. The following tips will help you construct clear and easy to understand questions**:** (adapted from 3, p. 157)

Tips:

* Limit the total number of questions – short is better than long
* Incorporate “plain language” so questions are easy for everyone to understand (4)
* Be sure each question asks about only one point. For example, if you ask about both the length AND difficulty of the session in one question, an individual would not be able to differentiate within one response that it was too long but not difficult enough.
* Check whether the space for a response is appropriate to the type of question. Don’t provide three lines when you want two words.
* Only ask questions where you intend to use the responses in your analysis. For example, when demographic data is requested, but not used. This wastes everyone’s time.
* When using a scale with a question, offer a choice of at least five options so respondents have a real choice, not a forced choice within a few options.
* Look at how much variety there is among the types of questions, such as closed, open, multiple-choice and scaled. Different types of questions solicit different responses and appeal to different perspectives. For example, a question asking people to rate items on a list shapes a response that conforms to the list. An open-ended question invites participants to respond based on their own “internal” list. Forced-choice questions (respondent must choose *yes* or *no*, *agree* or *disagree*) can constrain or polarize thinking.
* Anticipate your time: some find it more time consuming to analyze the text responses to open questions than the numerical responses to multiple choice or scaled questions.
* Avoid asking leading questions - questions that steer people in the direction of a particular answer. You can inadvertently skew the answers by the way you ask a question. As an example, if you ask people to identify what sector they are from and only give them one option for a response, those who work in two sectors will be forced to indicate only one of the sectors in which they work. Therefore, your results will not accurately reflect all of the sectors in which people work.
* For the final question, encourage individuals to say whatever is important to them
* Test out your draft questions with someone who knows nothing about the topic; they will be able to identify wording that is confusing or difficult to understand.
* Walk through how you will analyze the data once you have it. Ask yourself: what am I going to do with the results?

Designing the Evaluation: What Evaluation Questions Are Addressed in an Outcomes-based Approach5

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **In-session evidence of:** | | | | |
| **Assessment Tasks** | **Process Skills** | **Concepts and Issues** | **Event Agenda** (productivity, participation) | **Event Environment**  (logistics, organization) |
| *What will learners do in the training to demonstrate* ***evidence*** *of what they can do?*  *For example, in-session evidence of performance – assessment of tasks.* | *What* ***skills*** *must the learner master to demonstrate what they can do?*  *For example, specific acts, ability to do tasks – process skills.* | *What must the learner* ***understand*** *to demonstrate what they can do?*  *For example, specific facts, patterns, values, motivations – concepts and issues.* | *How did the activities and facilitator contribute to participants’ learning?*  *For example, provided activities that appealed to diverse ways of learning.* | *How did the facilities, technology and equipment contribute to participants’ learning in the session?*  *For example, offered web-based options to paper-based exercises.* |
| Did participants effectively demonstrate how they applied their new skills?  **Tools:**   * Questionnaires or structured interviews with participants * Participant reflections * Simulations * Direct observations * Video or audio tapes | Can participants demonstrate their mastery of the intended skills?  Can they list the skills?  Can they communicate those skills to others?  **Tools:**   * Paper or electronic questionnaires, including self-assessments and tests * Focus groups, interviews * Participant reflections * Personal learning logs * Case study analysis | Can participants demonstrate their understanding of the concepts and issues?  Can they list them?  Can they communicate those concepts and issues to others?  **Tools:**   * Paper or electronic questionnaires, self-assessments and tests * Focus groups, interviews * Participant reflections * Personal learning logs * Case study analysis | At our next educational event, how could participants support each other’s learning more effectively?  What did you do to contribute to the success of the educational event, other than participate?  What are you learning from other participants?  **Tools:**   * Questionnaires – paper or electronic * Participant reflections * Structured interviews * Focus group | What aspects of the facility supported (did not support) your participation?  What two words would you use to describe the facilities?  If we conduct the next education event at this facility, what could be improved?  **Tools:**   * Questionnaires – paper or electronic * Participant reflections * Structured interviews * Focus group |

Designing the Evaluation: continued

|  |  |
| --- | --- |
| **Post-session evidence of:** | |
| **Performance of learning at work** | **Employment matters**  **that affect at-work performance** |
| *What do learners need to be able to* ***DO*** *“in their work” that we’re responsible for addressing “in the training session”?*  *For example, post-session performance.* | *What does the organization need to be able to do to advocate, facilitate and support application of learning in the workplace?*  *For example, build on improvements implemented after previous educational events.* |
| Are participants consistently changing their practice on-the-job? If so, what evidence supports that conclusion?  What was the impact of this change in practice on service recipients? (For example, applying AODA accessibility standards):   * Did it affect individual well-being? * Did it influence individual cognitive, physical or emotional well-being? * Was implementation supported, advocated and facilitated by the organization?   **Tools:**   * Review individuals’ records, original reports, etc. * Questionnaires or structured interviews with individuals, families, supervisors | To what extent was implementation of learning supported, advocated for and/or facilitated by your organization?  Were any problems addressed right away so implementation continued?  Did the participants’ application of learning back at work affect the organization’s policies and procedures? If so, how? (For example, applying new safety policies and procedures)  **Tools:**   * Minutes from follow-up meetings * Questionnaires – paper or electronic * Structured interviews with participants and supervisors |

Step 4: Implement the Evaluation Tool(s)

Once the tool has been designed, test out a draft with a few people before you implement it. For example, your event Planning Committee, colleagues or individuals with no related experience with your draft. Different backgrounds will provide valuable perspectives when pilot testing an evaluation.

Establish a critical path that you can follow for completing each task. Confirm who will be involved and when for each step of the evaluation process. Create your own list or use the template provided (see [Step 4 in Appendix A](#appAstep4)), adjusting as needed. Elements to consider in your critical path include:

* Test out a draft evaluation tool with your Planning Committee, colleagues and/or individuals with no related experience with your draft
* Distribute the finalized evaluation. If you want to know about participants’ immediate perspectives on their learning, distribute the evaluation right after the educational event; in terms of determining longer term impact, you can distribute the evaluation after 21 days; however, you may have a diminished response rate.
* Organize technological support (e.g., software, courseware, web links, whiteboard, computers, cables, speaker phones, mobile devices, audio-recorders, projection equipment)
* Manage logistics. Reserve location and refreshments if using a focus group, ensuring accessibility for people with different abilities
* Arrange human resources (e.g., who will be facilitating, managing technology behind the scenes, inputting/reviewing/collecting responses/data?)
* Access flip charts, pads made of recycled paper, handouts of questions, markers that are nontoxic and unscented, pens/pencils
* Provide pitchers of water and glasses on tables
* Identify directions to parking areas, public transportation
* Thank respondents for participating in the evaluation
* Other?

Tips:

* To increase the number of participants’ responses, some session leaders try to offer an incentive – real or imagined! Some groups love chocolate; others enjoy humorous rewards such as the “suggestion” of a car; and some appreciate reminders at the final session break that an evaluation is forthcoming (with plenty of time to complete) and what it means for the future of educational events.

Step 5: Analyze the Data

Data analysis can become overly complicated when the purpose of the evaluation is forgotten. In this step, an approach to analyzing data is described that can be accomplished efficiently and can be accessible and useful for all stakeholders.

There are two types of data generated when designing evaluation tools:

* Quantitative data (numbers, scores)
* Qualitative data (text that reflects peoples’ attitudes, feelings and behaviours in greater depth).

Note that if qualitative data collection is used to piggyback quantitative questions, it can explain why a particular numerical response was provided. For example, “please explain your score in the previous question”.

The next two sections describe how to analyze each type of data. Note that when evaluations are completed online, you may be able to access tools that do a basic analysis and can display the results in different types of graphs.

Quantitative Data

Enter the data from your information gathering into a computer, whether numbers from a questionnaire, a scored demonstration or highlights from a structured recorded activity. Check the data for errors – a procedure called *data cleaning*.

Once you have cleaned the data, consider the responses to each question.

* When responses are scaled (recorded on a scale such as 1 to 5), calculate the *average* response by adding up the value of all the responses and dividing by the total number of responses.
* Note the distribution of responses so you can report on the central tendency of the scores as well as the variability across the scores – did participants mostly agree with the average response or did their responses indicate various perspectives (across the scale of 1 to 5)?
* Example:
  + In the following chart, consider the participant responses to the question: *How would you rate your organization in addressing “transfer of learning” problems quickly and efficiently, so training implementation could continue?*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1  Poor | 2  Fair | 3  Good | 4  Very Good | 5  Outstanding |
| 10 | 20 | 2 | 16 | 14 |

* + The average is 3.1, which is good; however, the distribution indicates that one-half the group is pleased with the organization’s addressing problems and one-half are not.

Tips:

* It is important to reflect both the distribution and the average when reporting quantitative results.
* Frame each question the same way for consistency. On a Likert scale of 1 to 5, the 5 would be the most desirable response for every question and the 1 the least desirable response. This will ensure that you can readily determine which questions had the most “positive” responses – the 4’s and 5’s.
* Capturing all the nuances of data analysis can be taxing at the best of times and omissions can easily occur. Have one or two colleagues review the draft to ensure its accuracy. As the old saying goes, “sometimes the fish is the last to discover water”; sometimes we cannot see what is surrounding us.

Qualitative Data

Enter the data from your information gathering into a computer, whether text from open-ended questions in a survey, an interview or a focus group.

* For each open-ended question, look for similarities and dissimilarities among the responses and cluster these together.
* Then look at the clusters to identify themes or patterns and highlight these manually, using highlighters or Post-it notes.
* If you are analyzing larger amounts of data, you can identify a computer program online that will serve your requirements.
* Keep in mind that although these programs have a number of helpful features, additional time is required to learn the program and to input and code the data.

Some common ways of looking for themes or patterns within each question, whether manual or electronic, include(6):

* Frequencies: how often the same or similar response occurs; you can rely on frequencies as a way of getting started with your analysis
* Magnitudes: levels or size of a situation or need
* Structures: the different types of needs (e.g., physical, mental, behavioural)
* Processes: the order among the elements of structure (e.g., do the needs begin with physical and then become more behavioural?)
* Causes: What are the causes of service gaps? Are they more common among those with only government funding? Among those clients with English as a second language?
* Consequences: How does the need affect caregivers, in both the short and long term? clients?

When documenting the analysis, provide the theme and a few examples that support that theme, so the reader has a sense of what the theme captures. For example, if the theme is “most important services”, examples might include: in-home respite, safety training and transportation reimbursement.

Remain curious during your data analysis. Read and re-read the notes several times to identify and revise themes. Through the technique of “*constant comparison*”, compare passages you select with all other passages you have previously selected within the same theme. This technique will support consistency within each theme and also help you to further explore any inconsistencies. As an example, you may notice that almost all of the session participants agree on the most important educational services provided, but that they disagree on the learning needs that are being met by those services. You would then look to see if any of the responses might give you a clue as to why this might be the case.

Tips:

* As in the quantitative analysis, have one or two colleagues review your qualitative data analysis for any clarifications or insights. You may find that, through discussion, a theme can be fine-tuned or jargon clarified so that understanding of your analysis is easier for readers.
* Keep in mind the original purpose for the evaluation when analyzing the data. What is my focus here? What am I trying to find out and how am I going to use this information?
* Be sure to clarify that an evaluation’s results can provide some “evidence” but not “proof”. *Evidence* refers to improvements in how participants perform on the job; *proof* means that an educational session is solely responsible for improvements in practice. As practice settings are under the influence of many variables, one influencer such as an educational session cannot be regarded as the proof that is solely responsible for changes in job performance or changes in client outcomes.
* Calculate and clearly identify the ratio of respondents to participants. If a small percentage of participants responded to the evaluation, the results cannot reflect the entire group – there is not enough evidence.
* Pay attention to unusual or atypical responses that are not part of a theme or pattern. Don’t disregard them; they may raise a unique insight that your stakeholders would want to know.
* Data analysis can be simple or complex – determine what is most appropriate for your needs and resources. Electronic tools or databases can help you to make sense of large amounts of data, if needed. For example, if there is a mixture of participants, you can explore which sub-groups said what and determine any similarities or differences that were evident.

Step 6: Present the Results

When presenting the results of your analysis, think about what your audience wants to hear: the analysis only, your recommendations based on the analysis and/or next steps in the educational process. For example, some funders only want to see or hear about how their funding was used and the number of people that benefitted. Your supervisors may or may not be quite interested in your perspective of what should happen next. Be sure to ask about your audience’s expectations of your presentation so that you are presenting the most valuable results from your audience’s point of view.

When presenting your evaluation results, these may be a report on their own, part of a larger event report and/or be accompanied by a presentation to an audience of stakeholders.

When the Results are a Report on Their Own

Provide an Introduction to the report that includes a thank you to the individuals who contributed to the evaluation, a summary of the results and any recommendations for follow-up.

If there were a large number of participants in the evaluation, provide the results in two formats:

* Results at a Glance – summarizes highlights of both quantitative and qualitative results
* Results in Detail – provides more detail of the quantitative results and examples of qualitative themes for each section.

When the Results are Part of a Larger Event Report

Include a reference to the Event Evaluation towards the end of the Executive Summary and in the Table of Contents, so readers know that an evaluation has been included and where they can find it. If the evaluation results prompt any changes, those recommendations can be referenced in the Executive Summary.

*“This report summarizes the discussion highlights of the meeting. The Evaluation Summary indicates that participants thought the outcomes of the session were achieved (Appendix X). They continue to appreciate the open discussion and evidence of progress being made regarding their input.”*

When the Results are Accompanied by a Presentation

If you are presenting your evaluation results at a meeting and decide to use PowerPoint, Powtoon, Prezi or other computerized presentation tools, here are the top tips for an outstanding presentation. Be sure to explore other computerized presentation tools as they become available. Audiences appreciate variety.

* Structure your presentation, giving a brief overview at the start. Be clear about what you want the audience to do after your presentation. Then present the evaluations results – essentials only.
* If requested, provide your recommendations. Repeat what you want the audience to do after your presentation.
* Print or share your presentation at the beginning so your audience can take notes.
* Minimize the amount of text.
  + Use text to highlight ‘key points’, not to cue everything you want to say.
  + When displaying charts or graphics, use only enough text to explain key points.
  + Determine which graphic best represents your numerical results. For example, to represent the numerical proportion of results, a bar graph uses bars of different heights whereas a pie chart uses slices of different sizes.
  + Clearly label all graphs and diagrams so they are visible to the audience.
  + Slides should reinforce highlights, not repeat your words.
* Keep the design clean and uncluttered.
  + Leave empty space around the text and graphics.
* Be sure the entire slide can be seen easily from all parts of the room.
  + Font size and colour matter.
  + Aim for a 30 point font.
  + Use colors that contrast and compliment so words and images are easy to recognize.
  + Make text colours dark contrasted with a light background, or light contrasted with a dark background.
* One picture is worth many words.
  + Keep the background consistent and subtle. Use quality graphics that enhance the topic of the slide.
* Standardize position, styles.
* Limit the number of slides to maintain audience interest.

Tips:

* Know your audience: those who may read the Evaluation Report and/or listen to your presentation about the report. Provide them with answers to: “So what? What’s in it for me, our organization and our clients?” Then breathe a sigh of relief!

References

1. Canadian Society for Training and Development (CSTD) *Competencies for Learning Professionals. Quick Reference.* 2013. <http://c.ymcdn.com/sites/www.cstd.ca/resource/resmgr/certification/quick_reference_the_essentia.pdf>. Last accessed 30 October 2017.
2. Steihl, R. & Lewchuk, L. (2008). *The Outcomes Primer*. Corvallis, Oregon: The Learning Organization.
3. Strachan, D. & Pitters, M. (2009). *Managing Facilitated Processes*. San Francisco: Jossey-Bass/Wiley.
4. *Plain Language Guidelines*, Government of Canada <http://www.btb.termiumplus.gc.ca/tcdnstyl-chap?lang=eng&lettr=chapsect13&info0=13>. Last accessed 30 October 2017.
5. Steihl, R. & Lewchuk, L. (2008). *The Assessment Primer:* creating a flow of learning evidence. Corvallis, Oregon: The Learning Organization.
6. Lofland, John & Lofland, Lyn H. (1995). *Analyzing Social Settings: A Guide to Qualitative Observation and Analysis.* Belmont, CA: Wadsworth.

Resources

The following resources were also consulted in the creation of this toolkit:

*Analyze This!!! Learning to analyze data.* (2008). The Association for Learning Development in Higher Education. <http://archive.learnhigher.ac.uk/analysethis/index.html>. Last accessed 30 October 2017.

Guskey, Thomas R. (2005/2006). A Conversation with Thomas R. Guskey. *The Evaluation Exchange*, A periodical on emerging strategies in evaluation exchange. Harvard Family Research Project, Harvard Graduate School of Education. Volume XI, Number 4, Winter.

*Evaluation Toolkit* (2012). Northwest Center for Public Health Practice, School of Public Health, University of Washington. Practical tool to help in effectively evaluating your trainings.

*Presentation Toolkit* (2012). Northwest Center for Public Health Practice, School of Public Health, University of Washington.

Strachan, D. (2007). *Making Questions Work.* San Francisco: Jossey-Bass.

Appendix A – Templates

Step 1: Determine the Evaluation’s Purpose

Designing the Evaluation: What You and Others Want to Know

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Interest in Evaluation** | | | | | | | |
| **In-session evidence of:** | | | | **Post-session evidence of:** | | | |
| **Stakeholders** | **What learner must do when at work** | **Skills and tasks the learner must master** | **Concepts, issues the learner must understand** | **Event process, productivity, participation** | | **Event environment, logistics, management** | **Performance of learning at work** | **Factors that affect their job performance** |
| **Participants** |  |  |  |  | |  |  |  |
| **Participant’s Supervisor** |  |  |  |  | |  |  |  |
| **Participant’s Client** |  |  |  |  | |  |  |  |
| **Session leader/**  **educator**  **organizer** |  |  |  |  | |  |  |  |
| **Public** |  |  |  |  | |  |  |  |
| **Planning Committee members** |  |  |  |  | |  |  |  |
| **Funders** |  |  |  |  | |  |  |  |
| **Other?** |  |  |  |  | |  |  |  |

Step 2: Estimate Evaluation Resources

Evaluation Resources Budget

Some questions to consider regarding evaluation resources:

* What resources/funds do you have at your disposal?
* What expenses should you anticipate?
* What human resources do you have access to?

|  |  |  |
| --- | --- | --- |
| **Expense Item** | **Estimate** | **Actual** |
| Paper evaluation – printing | $ | $ |
| Telephone for interviews, group discussion | $ | $ |
| Venue rental – for focus group discussion, report presentation | $ | $ |
| Refreshments, breaks | $ | $ |
| Technical equipment | $ | $ |
| Admin costs for inputting | $ | $ |
| Travel and/or parking costs (staff/participants) | $ | $ |
| Accommodation costs (staff/participants) | $ | $ |
| Data analysis – human resources | $ | $ |
| Report writing, editing | $ | $ |
| Backfill expenses | $ | $ |
| Other | $ | $ |
| **TOTAL:** |  |  |

Step 3: Design the Evaluation Tool(s)

Designing the Session2 – Template from Step 2: Use an Outcomes-Based Design from the Toolkit for Planning Education Events (discussed in more detail in the Toolkit for Planning Educational Events – accessed online at [www.community-networks.ca](http://www.community-networks.ca); type toolkit name into search box)

|  |  |  |  |
| --- | --- | --- | --- |
| Intended Outcomes | Assessment Tasks | Process Skills | Concepts and Issues |
| *What do learners need to be able to* ***DO*** *“in their work” that we’re responsible for addressing “in the training session”?*  *For example, post-session performance.* | *What will learners do in the training to demonstrate* ***evidence*** *of what they can do?*  *For example, in-session evidence of performance – assessment of tasks.* | *What* ***skills*** *must the learner master to demonstrate what they can do?*  *For example, specific acts, ability to do tasks – process skills.* | *What must the learner* ***understand*** *to demonstrate what they can do?*  *For example, specific facts, patterns, values, motivations – concepts and issues.* |
|  |  |  |  |

PWS Sample: Outcomes – PWS Workshop

The following table provides an example of learning outcomes for a session on Prader-Willi syndrome (PWS), a complex genetic condition that affects many parts of the body.

| PWS Intended Outcomes | PWS Assessment Tasks | PWS Process Skills | PWS Concepts and Issues |
| --- | --- | --- | --- |
| *What do learners need to be able to* ***DO*** *“in their work” that we’re responsible for addressing “in the PWS training session”?*  *For example, post-session performance.* | *What will learners do in the PWS training to demonstrate* ***evidence*** *of what they can do?*  *For example, in-session evidence of performance – assessment of tasks.* | *What* ***skills*** *must the learner master to demonstrate what they can do?*  *For example, specific acts, ability to do tasks – process skills.* | *What must the learner* ***understand*** *about PWS to demonstrate what they can do?*  *For example, specific facts, patterns, values, motivations – concepts and issues.* |
| 1. Identify the unique characteristics of PWS | Answer test questions | * + Discuss how the characteristics of PWS differ from those of other developmental disabilities | * + Characteristics of PWS |
| 1. Describe the behavioural management strategies that would best support a person with PWS | Complete a case study | * + Identify the specific behavioural issues and recommend interventions   + Collect data to monitor behavioural issues | * + Unique philosophy around supporting an individual with PWS   + Strategies to assist the person to manage their food intake |
| 1. Identify the health concerns of people with PWS | Complete a case study | * + Identify key factors to look for when assessing a person with PWS to identify health concerns | * + List the common health concerns of a person with PWS and how they present |
| 1. Communicate information to family members about the primary health concerns of a person with PWS | Participate in a role-play | * + Demonstrate specific techniques for relaying health concerns to family members in a clear and compassionate manner | * + Understanding the issues/ concerns that families have   + Techniques for effective communication with families |

PSW Sample: Evaluation Questions – PWS Workshop

Questions about the in-session and post-session experience (seven components in the previous table) are provided in both quantitative and qualitative formats, related to a sample PWS workshop.

Questions About the In-session Experience

**Questions Regarding the PWS Assessment Tasks**

Quantitative: Circle the number that indicates the extent to which you solicited and used feedback from your instructor as your (PWS) project progressed.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1  Not at all | 2  Very little | 3  Somewhat | 4  Quite a bit | 5  A great deal |

Qualitative: Describe a situation where you solicited and used feedback to make progress on your PWS project.

**Questions Regarding PWS Process Skills**

Quantitative: What do you look for when assessing a person with PWS? (Provide a list of 7 factors.)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1  Not at all | 2  Very little | 3  Somewhat | 4  Quite a bit | 5  A great deal |

Qualitative: Describe how you would relay health concerns related to PWS in a clear and compassionate manner to family members.

**Questions Regarding PWS Concepts and Issues**

Quantitative: Which of the following accurately represents the incidence of PWS at birth?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1  1/15 | 2  1/150 | 3  1/1,500 | 4  1/15,000 | 5  1/150,000 |

Qualitative: Identify three concepts related to PWS. What is one thing you would tell staff in your organization about each of these three concepts that would be most useful in their work?

**Questions Regarding the Educational Event Agenda**

Quantitative: Would you recommend this event to a colleague?

Yes/No

Qualitative: Please explain why or why not?

**Questions Regarding the Educational Event Environment**

Quantitative: Please circle the appropriate numbers to describe your opinion of the education event setting:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Poor  1 | Fair  2 | Average  3 | Very Good  4 | Excellent  5 |

Qualitative: What else could the facility have provided to enhance your participation in the PWS educational event? (one thing)

Questions About the Post-session Experience

**Questions Regarding Performance of Learning at Work**

Quantitative: Circle the number that best describes how successful you were in realizing the intended PWS learning outcome.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1  Not at all | 2  Very little | 3  Somewhat | 4  Quite a bit | 5  A great deal |

Qualitative: What are you doing differently at work with individuals with PWS as a result of attending this education event?

**Questions Regarding Employment Matters that Affect At-work Performance**

Quantitative: When “transfer of learning” problems were identified within the organization, how would you rate your organization in addressing those problems quickly and efficiently, so training implementation could continue?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1  Poor | 2  Fair | 3  Good | 4  Very Good | 5  Outstanding |

Qualitative: Describe two on-the-job training implementation successes that were recognized and shared in your organization.

Step 4: Implement the Evaluation Tool(s)

Critical Path for Evaluation Process

Create your own list or use the templates provided, adjusting as needed. Elements to consider in your critical path include:

|  |  |  |  |
| --- | --- | --- | --- |
| √ | Date | Task (if required) | Lead |
|  |  | 1. Test out a draft evaluation tool with your Planning Committee, colleagues and/or individuals with no related experience with your draft |  |
|  |  | 1. Distribute the finalized evaluation |  |
|  |  | 1. Organize technological support (e.g., software, courseware, web links, whiteboard, computers, cables, speaker phones, mobile devices, audio-recorders, projection equipment) |  |
|  |  | 1. Reserve location and refreshments if a focus group, ensuring accessibility for people with different abilities |  |
|  |  | 1. Arrange human resources (e.g., who will be facilitating, managing technology behind the scenes, inputting/reviewing/collecting responses/data?) |  |
|  |  | 1. Access flip charts, pads made of recycled paper, handouts of questions, markers that are nontoxic and unscented, pens/pencils |  |
|  |  | 1. Provide pitchers of water and glasses on tables |  |
|  |  | 1. Identify directions to parking areas, public transportation |  |
|  |  | 1. Thank respondents for participating in the evaluation |  |
|  |  | 1. Other |  |