Project Evaluation and Assessment

NSF EPSCoR PD/PA/EOD Meeting
January 23, 2015
Our Presenters

- Jim Gershey – Louisiana
- Pips Veazey – Alaska
- Michelle Gregoire – New Hampshire
- Amy Slocum, Delaware
Introduction
Objectives of Evaluation

• Assessment of progress toward goals listed in proposal and strategic plan
• Evidence of broader impacts
• Effectiveness of diversity, workforce, outreach efforts
• Determine if changes/adjustments are required
Components of Evaluation Plan

- Strategic Plan
- External Evaluation Team
- Internal Evaluators
- External Review Board (ERB)
- Project Execution Team (PET)
- Reverse Site Visit
- EPSCoR Committee
External Evaluation Team

• Developed an easy-to-use web-based data collection and survey tool for formative and summative evaluation

• Data is collected, collated and reported back to project management team

• Evaluators attend annual meetings

• Some templates are automatically completed
Lessons Learned

• Helpful to have External Evaluation Team involved in the development of the Strategic Plan
• Ease of use of the data reporting system is key
• Plan way ahead for visits by External Review Board
• Have external evaluators attend state meeting
Objectives of Evaluation

- Overall productivity – goals listed in strategic plan
- Research capacity development
- Production of scientific knowledge and research capacity
- Institutionalization of research program across the state
- Communication and learning
- Impacts on students
- Integration and impacts of stakeholders
Components of Evaluation Plan

- University of Alaska Program Advisory Council (university)
- External Experts Advisory Committee (national)
- External Evaluators (national)
- State Committee on Research (statewide)
- Reverse Site Visit (NSF)
- Strategic Plan
External Evaluation Team

- Faculty surveys and interviews (annual meeting/teleconferences)
- Students surveys and focus groups
- Stakeholder interviews (internal and external)
- Bibliometrics
- Online metrics
- Social network analysis (interdisciplinarity)
Lessons Learned

- Engage evaluators in significant developments
- Plan ahead – communicate timing of major events
- Identify people at each partner institution to serve in advisory capacity
- Significant investment for every state – how can we as a community maximize the benefit of our evaluations?
Objectives of Evaluation

• Assess research capacity development
• Accurately assess project strengths and weaknesses
• Evaluate effectiveness of research collaborations, educational programs
• Recommendations for course correction
Components of Evaluation Plan

• Strategic plan
• External evaluation team
• AAAS scientific advisory board
• Reverse Site Visit
External Evaluation Team

• Integration: Network analysis
• Productivity: Bibliometric analysis
• Outreach: Coordination, impact, diversity
• Student impacts: Engagement in research activities
Lessons Learned

• Evaluators: Measure impact
• Advisory board: Guidance, national perspective
• Both should contribute to strategic plan; annual review of evaluation plan with management team
• Attend team meetings: Presentations, observations, interviews, feedback to management team
• Reverse Site Visits: Can be useful but limited perspective
Objectives of Evaluation

• To insure that the needs of critical stakeholders (e.g., Delaware EPSCoR leadership and NSF) are met through the evaluation process and that results are useful and timely - Patton’s utilization-focused approach (Patton, 2008)

• Use information provided by the internal evaluation team and program leadership, along with stakeholder interviews during a site visit, to provide guidance on achieving benchmarks

• Assess progress as it relates to the relevant program elements and goals

• Offer perspectives on the local, state, and national impacts of programmatic elements.
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<tr>
<th>Evaluation Foundations</th>
<th>Methods</th>
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<td>• Utilization-Focused Evaluation (Patton 2008)</td>
<td>• Faculty surveys and interviews</td>
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<td>• Guiding Principles for Evaluators (AEA, 2004)</td>
<td>• Key informant interviews</td>
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<td>• Internal and External</td>
<td>• Pre/post student and teacher surveys</td>
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<td>• Summative and Formative</td>
<td>• National Student Clearinghouse – “on track”</td>
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<td>• Quantitative and Qualitative</td>
<td>• Comparison Groups</td>
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<td>• Bibliometric/online metric analyses</td>
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<td>• Social networking</td>
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<td>• Technology usage data</td>
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External/Internal Evaluation Team

**External Evaluation Personnel**

- State Steering Committee
- External Advisory Board
- AAAS Panel
- NSF RSV Panel

**Internal Evaluation Personnel**

- Internal Evaluator
- Institutional Evaluation Support
Lessons Learned

• Focus evaluation on specific components of the program for each visit
• Ensure we are using evaluation reports to help guide programmatic decisions
• Determine what is doable and within a realistic scope of time and available funding
• Internal evaluator who is a key member of the management team as they provide a critical eye and perspectives beneficial to keeping program leaders focused on goals, objectives and metrics
• Identify individuals at each partner institution to serve as evaluation contact to call that ensures ownership, consistent reporting and institutionalization
Questions?
Round Table Discussion

“Brain Forest”
Discussion Format

- 2:00-2:10 – first round table discussion Q (10 min)
- 2:10-2:15 – transition
- 2:15-2:25 – second round of discussion Q (10 min)
- 2:25-2:30 – transition
- 2:30-2:40 – third round of discussion Q (10 min)
- 2:50-end – Report out key findings
Discussion Questions

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