

Program Evaluation: One Step Toward Improving Your Supported Employment Program - Transcript

October 31, 2006

Anthony Plotner
RSA Region V CRP-RCEP
117 Children's Research Center
51 Gerty Drive
Champaign, IL 61820
plotner@uiuc.edu

Kathleen Oertle
RSA Region V CRP-RCEP
117 Children's Research Center
51 Gerty Drive
Champaign, IL 61820
oertle@uiuc.edu

Power Point Presentation: www.ed.uiuc.edu/illinoisrcep/activities/teleconf.htm

Lynda Leach, Facilitator: Welcome to RSA Region V CRP-RCEP at Illinois monthly teleconference. Today's presentation is on program evaluation of supported employment programs. It is my pleasure to introduce our presenters Tony Plotner and Kathleen Oertle who are just down the hall from me. We are all at the University of Illinois in Urbana-Champaign and we are all on the same project, the RSA Region V CRP-RCEP at Illinois. Today they will be talking about *Program Evaluation: One Step Toward Improving Your Supported Employment Program* and they will walk you through the steps to what it takes to improve your project or program.

Kathleen Oertle: Thank you Lynda. Thank you everyone for joining us today. My name is Kathleen Oertle, or Kat Oertle as you heard Lynda mention, and I am here with Tony Plotner. We are going to talk with you today about evaluating supported employment programs. If you are looking at the PowerPoints I am going to begin by referring to slide number two and go over our presentation objectives for today. First of all, we are going to talk about what evaluation is, give you some ideas of how you can think about evaluation, and also how you think about what evaluation is relative to your own supported employment program. We are also going to talk to you about the reasons to conduct an

evaluation and why people might do it, and how you personalize that and then how to go ahead and plan and implement your evaluation. Finally, what do you do once you have the data? How do you make sense of it and how do you use the data to get results to make improvement in your program? Moving to slide three.

Tony Plotner: I think one reason that we feel that this topic is necessary is that at least in our experience evaluations or formal evaluations aren't really being used in supported employment programs. We have found that supported employment programs use two very brief customer satisfaction surveys dealing with the community employer or their customers. Not that they can't be useful but the response shows bias in favor of the program or those who have problems with the program and usually there is a limited response rate. Another problem is that they are not really used. They are just collected for the sake of being collected. We feel it is important that more supported employment programs actually conduct more formal evaluations. Today, to reiterate how we are going to read through the objectives – on slide number three we have the outline. These are things that Kat and I felt were important today in understanding the evaluation process. What is evaluation? How does evaluation differ from research? Some of the challenges and myths about evaluation. Why should agencies conduct evaluations? How should these evaluations be done? What do you do with the data when you collect it and make sure that it is useful data? We also infused some of our evaluation experiences that we have had throughout the region doing site visits and more formal evaluations.

Moving on to slide number four – we are going to talk about what is program evaluation? Evaluation is a process of determining whether a program or certain aspects of the program are appropriate or effective and if not then how to make them so. In addition, evaluation shows if programs have unexpected benefits or create unexpected problems as well. There are many definitions and various definitions on evaluation that have been offered over the years. While each definition takes a slightly different view they all share important similarities. First, evaluation is viewed as a systematic process. It shouldn't be conducted as an afterthought but rather a planned and purposeful activity. Evaluation is a process for enhancing knowledge and decision making whether or not the decisions are improving or refining a program or making judgment about the work or value of what is being evaluated. On this slide we have provided what we think is a clean definition that goes with the process of collecting information, using it to improve the program, and making decisions. It judges program quality in general.

Kathleen Oertle: Okay, in moving to slide number five we are going to talk just a little bit about the difference between evaluation and research. Now you have some general idea of what evaluation is at least from the context of this presentation. Oftentimes people will confuse the idea of evaluation and research as though they are one and the same thing. They really aren't. In thinking about evaluation, what you are doing is trying to look at the impact of a program or even in a more broad sense the quality of the program – how the services are working within that program and how they are impacting the people using the program. This is not the same as research. Research often is the idea of generating new knowledge that will somehow contribute to a body of extant knowledge or possibly be a new avenue of research or exploration. Therefore, when you think about research you are thinking about research on a larger sense of generalization – being able to compare that group to other groups out in the population and say things about the population based on what you found out on that sample. That would be the way research works.

In program evaluation what you are really doing is you are taking a situation in a moment in time and you are asking questions about that particular situation or pieces of it. More on how you do that later in our presentation. What you are doing by looking at a piece of time, looking at an operation within a program, and looking at those pieces as they are working in that moment in time, you are really looking at this context to answer evaluation questions. You are answering those evaluation questions again in that moment in time and you are making sense of them in a very important way but it is based on things such as decisions you want to make – again how you want to improve the program and what kinds of strategies you might implement within that program. They only make sense within that program. You really cannot take what you learned from that particular program and apply it then in a larger general sense unless you do further investigation and evaluation. It is important to know that you use research methods within evaluation. When we go through this process you are going to have evaluation questions that start the framework. You will also see things about how to collect data and how to make sense of the data – these come from research and research methodology. However, you are not going to be necessarily concerned with some of the experimental design pieces that you would be with research. Evaluation can be a part of a larger research project however. It is important to think about that. You can use it in lots of ways. We are going to talk about several examples of that and how you might use evaluation within your project as we move through this presentation.

Moving on to the slide, Views of Evaluation, we want to focus briefly on some of the challenges or myths that might occur or might be in your framework when you think about evaluation. We are now on slide number six. I am going to talk just a little bit about challenges and Tony is going to point out some of the myths. However, we want to say right from the beginning that some things that are viewed as challenges also can be viewed as myths. Some things that are myths can be viewed as challenges. What we are really talking about is the way people think about evaluation. It may be based on your past experiences.

First of all, I want to talk about intuition. Often we know because of our field experience, because of our knowledge, because of just who we are in the profession of rehabilitation that our intuition or our gut feeling often forms the basis for decision making. Often they turn out to be sound decisions and ones that we feel are working very well for us. However, when you look at a larger program decision, using intuition may not be the best way to make program decisions, especially when it comes to spending money, whether on additional job coaches or job development. If we are just using our gut feeling we may not be using strategies that are really effective in a way that could improve the program on a larger scale. So intuition isn't necessarily enough. It is good and we want to use it. However, it is not everything. We want to do more than that.

Some people see evaluation as being threatening. You can think of it in lots of ways. For example, if I am working as a director, a job coach or employment specialist, and someone comes in and they start asking questions about my job and suggesting ways to improve there could be some defensiveness. On a larger scale, as an administrator being asked by a funding source to do an evaluation, there might be some threats to your program or some questions about how you are operating that program. So, inherently you can see that a challenge of feeling threatened possibly could be a part of the evaluation. However, what Tony and I are going to talk about today is how you build evaluation as an ongoing process, not something that just happens as a one-time thing. It is something that is part of the everyday routine and becomes more normative so that people don't necessarily feel threatened.

Tony Plotner: Being threatened is the most prevalent challenge or fear. Kat touched on it. The truth is that the evaluation will reveal new information that shows aspects of the program that are not working effectively but that is good news, not bad news – something can be done to improve the matter. We will talk about involving those direct service professionals in your evaluation so they have more of a buy-in and do not feel threatened.

Kathleen Oertle: It is important to be involved in the evaluation from the very beginning so that everyone feels invested in program improvement.

The next one that I want to mention is this idea that it takes away from doing my job. As a rehabilitation professional we are already very busy. We have lots of tasks that we are doing, paperwork and consumers with whom we are working, as well as the community and parents and guardians. Again as I had mentioned, we want to think about evaluation as part of our everyday job. In fact, if we think about our jobs we do evaluations pretty much on a continual basis. However, we may not necessarily collect data on that and analyze it in a systematic way. That is the difference between our everyday tuition about right and wrong versus this idea of a systematic evaluation and the process that Tony and I are talking about today. It won't take away from your job if you look at the data already being collected. How do we use that data in a way that is more meaningful to us as opposed to recording it in some format, a file, or database, and then not looking back at that in a larger sense. So, what we are talking about today is taking the data, the things that we know you are already doing, and doing them in a way that is systematic so that you can make that data more useful for making program decisions.

Tony Plotner: I am going to add one challenge to Kat's list that Kat and I have both found –there is no perfect evaluation design. You can't worry about the plan being perfect. It is far more important to do something than to wait until every last detail has been tested. If you were to search the literature about evaluation it could be very overwhelming. I think that is often a major challenge.

There are a lot of myths about program evaluation. One being there is not enough time or evaluation is too difficult. Many people believe that evaluation is highly complex, has to occur at a certain time and a certain way, and outside experts are needed to come in and understand terms like validity and reliability. That is not always the case. I think they have to be willing to commit to understanding what is really going on. A lot of program staff will say that they do evaluations just not in a formal fashion. I am an advocate of it being more formal and a more thoughtful planned activity. You just don't get the most out of your efforts if it is not planned. It is not very complex. It does take some thought and some time but I think it is important that there is always enough time to do something as important as improving your program.

Another myth – evaluation is very expensive and not worth doing. It can be expensive but it doesn't have to be. Many people believe evaluation is too difficult. Many people believe it generates a lot of boring data and useless conclusions. I think that is the way evaluations used to be, but now these days the focus is on utility.

The last myth – a force by outsiders. Sometimes they are requested by outsiders but as we mentioned earlier the fundamental purpose of evaluation is a greater understanding of the program to improve the

program.

Kathleen Oertle: Before we get into the actual how do you plan for this and how do you form your questions and how do you implement evaluation, Tony and I thought it would be really important to talk a little bit about our evaluation assumptions. This is our framework when we approach evaluation.

Tony Plotner: We've taken evaluation theory courses and method courses and we considered ourselves novice evaluators. We knew a lot and had a lot of experience on supported employment programs and we believed the participatory evaluation approach would be the ideal. Our initial dialogue in our first evaluation consisted of our being able to get together an evaluation steering committee that consisted of several key stakeholders. This committee was based on the stakeholders' amount of participation in the program, stakeholders' concern for program success, ability to represent to other key stakeholders, and ability to assist with determining process and outcome indicators. We found that the implementation of doing this wasn't quite as easy as we thought. You think you can't get a useful, quality evaluation without including all of these people and as Kat mentioned earlier, it is a contextual thing and every program is different. In reality we found in the last evaluation that we used the stakeholders as a data collection source and we used them in implementing the results so that they could have some investment to help the program move toward where they want to be.

Kathleen Oertle: Stakeholders are the folks involved in the program and we are going to get more into who the audience is but it would include people like you. It would include people who are users of the program, your consumers, as well as folks in the community like our community employers. As Tony was saying the ideal is to get all these folks together and have them all give you input about the questions and feedback and about how you put the design together. There is a lot of literature on utilization of results tied to buy-in through participatory planning. That is not new for evaluation. We talked about that within rehabilitation as well when we think about community involvement and connecting the partners. However, as you have probably experienced it is not always possible to get all these players together at one time and necessarily have all their involvement at the same level and have equity for everyone. Sometimes you find yourself using them as data sources rather than a steering committee behind your evaluation.

Tony Plotner: We are not saying that we wouldn't recommend that. I think if your program has stakeholders who want to be involved and who are actually going to contribute then that would be the ideal, but not all programs think about that when planning an evaluation. It might not be the most feasible or possible.

Kathleen Oertle: We go in with the assumption that we will get their participation knowing that that may not happen at the premium level, but that we may get bits and pieces of that. That moves into our second assumption. When we approach program evaluation, as you have heard from the beginning and even from our title, we are approaching it from a program improvement point-of-view. Assessing program quality and looking at what the program is doing, the quality of the services, the intention behind the actions of the program, what is actually happening, you can then make recommendations on those actual happenings. In our experience it is really important from the beginning to think about those quality indicators. How are you going to know if a service is good when you see it? That is the question you are trying to answer. So from the beginning you want to think about those quality indicators and

how you put them together in a way so that you can measure your data against them, so that you can actually make decisions based on those particular goals that you are trying to achieve within your program. Again, these are our assumptions as we go into evaluation. We think it is important as you approach your own evaluation that you think of some of your own assumptions. They may not be the same as ours. However, as we go through the information with you today this is the framework we are using.

Slide eight is a diagram. What you have here is an example of the whole shebang if you will, the whole planning piece all the way through the movement of collecting data, to analyzing the data, reporting the results, implementing the information gained through data collection and analysis. What we wanted to do here is give you a visual representation so that as we go through the pieces of this in this presentation you have some idea of how we put this together. I want to point out that you always want to think about why you are doing this and what you are planning with the results. It is important to think from point “a to z” so that once you get to “z” you have some idea of what you plan on doing. You can tweak your plan along the way. However if you haven’t thought through all these steps you may find yourself caught in the middle of the process and not sure where to go next. Again, if you look at the visual representation, you have the planning and designing piece and then data collection. The bubbles that we have here are not the only places you can collect data. These are just examples. Again we will share some more with you as we move through this. Next we have the analysis, recommendations, and reporting the results. So you can see in this example we have solid arrows which are for the current evaluation activities on which you are focusing. Next you have these broken arrows or dotted arrows that go around because we are firm believers that evaluation is not a one-time event. It is a process.

So, if we move to slide number nine we start to get into how do we do all this stuff? You have to consider some questions. You can see the picture of a pair of glasses with question marks on it. Our idea is that you are looking through these lenses as you are designing and planning your evaluation so you are going to want to answer the question of what. This is what are you going to evaluate? We are going to elaborate on each one of these with the next few slides. Why? Why are you doing this evaluation? What is the intention behind it? You need to know that as you make decisions about your planning for your evaluation. For whom are you evaluating this? Think about the audience that you are going to share your results with and possibly get input from as you are going through this process. Where are you going to get the information? Where is this data? You need to have some idea as you go forward to what possible courses you already have and what you also need. You also need to think about how you are going to collect this data or how you are going to find it. Then, finally, what are you going to do when you get to the point of having the evaluation data? One question you don’t see on here but I do think is important to address is this idea of when do you do an evaluation? We don’t have a slide on this to elaborate on it but I think that you should be aware that there are different schools of thought on this. There are some folks who feel you shouldn’t evaluate a program until it has actually had a chance to be up and running for a period of time. There are some people who also believe that evaluating as you are implementing something new is equally okay. If you are working with a team on an evaluation it is important to talk about when to do the evaluation as it makes a big difference on how you are going to use the results. For example, if it is a brand new program and you are evaluating certain pieces of it you may not want to make decisions based on that information since it is new. If you have an older program you may get different data from that program. Again, just keep that in mind as you start to get started.

So, if we move to slide ten – getting started this is the “what” piece. Are you going to evaluate a whole supported employment program? Are you going to evaluate the supported employment program and how it ties to a day training program? Are you going to evaluate just a piece of your supported employment program? You may just be looking at job development and the marketing piece. Maybe there has been an issue or some kind of a behavior going on that you want to address – staff morale or this idea of longevity or retaining staff. Maybe there is a specific goal or outcome that you are trying to address within your program. Then finally you can think about community concerns. Maybe there is something that has been brought to your attention from an employer or possible community member who is involved with your agency. You think that is an interesting question. I am not sure how to answer that. That might be the evaluation piece. Then finally. “Why” - after the “what.” What is your intention from the very beginning. This will help you decide which parts of the program to evaluate or if it is the whole program.

Tony Plotner: Many times we ask this question, “Why do you want to do an evaluation?” Some say, “We want to judge our program’s worth and our program’s ultimate outcomes.” After probing we get many other reasons. I am going to go over a few right now. It is important to say that you can have several different reasons, but you have to clarify program goals. An evaluation facilitates managements’ thinking about what the program is really all about, its goals, how it meets its goals, and whether a program is working as planned. It verifies that you are doing what you think you are doing. It can verify that the program is really running as it was originally planned. Obviously, you can have a better understanding of your program. You are better equipped to make crucial organizational decisions that comply with funder requirements. Sometimes you have to, but Kat and I are advocates of being proactive in your evaluation. It can always produce data and results that can be used for public relations or promoting services. However, that is kind of a secondary reason. Maintaining and improving quality – it can make services more efficient and less costly or identify program strengths in those areas. There are a few side benefits that I didn’t put up here that I think are important. Through our evaluation we found that a lot of people appreciate getting an opportunity to say what they think and share their experiences. It is one way of listening to people and letting them know that their input is valuable. It can also boost employee morale by letting them know that management is listening and their work is appreciated.

We will move to slide number 12 – the audience. Try to think about who will use the evaluation and how they will use it. We have consumers, funders, the community, and professionals. You have to think about the audience when you think about forming your questions.

Kathleen Oertle: On slide number 13 we are starting to think about forming evaluation questions. As Tony said, once you have the “who” in mind and the audience that you are going to present your results to or share your recommendations with, you have the “why” you are doing your evaluation, and “what” you are evaluating. You can now start thinking about what kind of questions you want to ask of your audience. How are they going to take the answers for this question and make it meaningful or useful? We are firm believers in recording all this information in document format so that you can cut the pieces that you don’t feel are going to be ones that you have the time or resources for and aren’t directly answering your evaluation questions.

Tony Plotner: Let me just mention that it is necessary to prioritize your evaluation questions. You want to distinguish what you really need to know and what would merely be nice to know. You want to keep the evaluation manageable. It is better to stay focused and answer only a few questions well. On slide 14 there are some examples of questions to give you an idea of the process. The first two are quality of service to their customers and the needs of customers. And three and four are about customer relations, marketing, staff, etc.

I am going to go on to slide number 15 – information sources. Where do you get your information? When you think about answering your questions and what you have identified with your questions you should begin to figure out how you are going to answer them. It stretches beyond the consumer and the employer which I mentioned earlier. It is what supported employment programs are typically doing when they limit their evaluation data to those two sources. We think it is important to look beyond the community or literature and actually look at data you already have. We are going to talk about that here in a little bit.

Kathleen Oertle: Okay, so in slide 16 you have the “how” – you know how are you going to collect this information. There are lots of different ways you can go about it. There are a bunch listed here. One thing that is not listed on this slide is case studies. In our examples we focused on interviews, observations, program reports, and record review. The things that you see us elaborate on from this point on are going to be from those particular sources of information. Once you have the data it is important to think about data quality.

We have three main things listed on slide 17. One is triangulation. Triangulation means this idea of looking at things from three different perspectives so that you are verifying that what it is that you think for one set of data is somehow justified or verified through other sources. When you think about supported employment you can think about it in a couple of ways. You can think about consumers. You can think about direct-service personnel and employers. That is a triangulation. Methods to collect that information would be observation, interview, and document review. Again, triangulation among those three forces. Again, what you are trying to do is verify that what you think you know is in fact what you know. With instrument evaluation – you can choose instruments that are already out there and have been checked for reliability and validity. However, it is not necessary. You can create your own survey questions or interview questions or even your checklist for observations on your own. But know that it is important to pilot that stuff ahead of time, meaning try it out on a reliable source – maybe a group of consumers, one or two consumers, or one or two direct service personnel and maybe one or two employers and then ask them afterward what did they think you meant by that question? Finally, meta-evaluation is this idea of having someone evaluate your techniques in evaluation.

Toward the end of our presentation there are some slides that give you some Web sites for both the field standards and checklists within evaluation so you can take a look at those. We also feel like peer review is important. If you know someone who does evaluation you can have them check through your methods as well as your reporting to make sure it is user friendly, that it is accurate, and that you haven't missed something that might be important to answering your evaluation questions.

Tony Plotner: I am going to go back for a second and talk about data collection methods. Just a little self promotion. We are a good resource here. We have access to six states of CRPs and a lot of them

are doing evaluation and they already have developed instruments. I am not saying that you would use their ideas but it would save a lot of time to kind of customize those to your agency. I am all for borrowing and seeing what else is out there before I create something from scratch.

Kathleen Oertle: Right, as Tony mentioned the CRP-RCEP Region V is here as a source of information for you. I think that is important to mention and for you to utilize it.

Tony Plotner: We can go to slide 18. It is a what Kat and I used – a snapshot of what evaluation looks like on a quick and easy evaluation planning guide document.

Kathleen Oertle: You can download this off the Web site.

Tony Plotner: Everything we have talked about up to this point is on the sheet. We have talked about what we are evaluating, who it is for, where we are getting information, and how we are going to do it. We have also included a couple of examples. Slide 19 – evaluation questions and subcomponents. I think it becomes necessary to break some of these questions up into component parts. It helps the planning to be a little more focused. You might need to ask mini questions or sub questions to get the answer to one of your major or primary evaluation questions.

Kathleen Oertle: Just one other thing I want to say about these forms – it is a place to collect all of the information that you have been gathering so far in your planning so that you can lay out your plan and know what you have already and what you need. You can see from our samples that often times your audience, your information sources, and even your instrument can be the same thing across your questions. As Tony was saying about time and this idea of expense you can find that several of the things that you are collecting data for may answer a variety of the questions that you have created for your evaluation. We are going to skip on past the forms to slide number 23.

Tony Plotner: I think it is important on these evaluation forms to note the column of data that you already have. Going back to the whole time issue, there may already be a lot of information that you have and you don't have to recollect. So, slide 23, I think the final task in planning an evaluation study is describing how it will be carried out. I think a management plan is the best way to oversee a project - who is going to do what and how much will it cost. Will it be within budget? A thorough systematic evaluation is complex so to make an effort to be successful evaluators must manage not just the evaluation activities, but the resources allocated to carry them out. I put three bullets here but it is really a multi-faceted thing. Some evaluation managers supervise other staff, they serve as a liaison for evaluation plans, participants, other stakeholders but I think the major points are that the tasks to be performed and the timeline for each task should be pointed out – personnel and other resources required to complete the tasks or their responsibilities and then the cost and the end product.

Moving on to slide number 24 – this is another kind of sample that we like to use. We call it our evaluation-phase documents. It is not really the management plan where we look at who is doing what and how it is going to be done. This is to make sure that our evaluation goes forth so we are not back tracking. You can also move certain activities into different phases. We found using phases and documenting the process to be an easy way to conduct an evaluation.

Kathleen Oertle: If we break those bigger pieces from the management plan into phases, it gives us a chance to actually evaluate or reflect on what we are doing within the evaluation. Let's say that at the end of phase one we are concerned about something or we feel like we need to move in a different direction, we have a chance to reflect on that and make changes within the plan along the way. We see each one of these phases as a place to stop and reflect and make changes that will continue to lead toward those evaluation questions. This guiding document is your plan in a nutshell. It is important to keep focused on what your evaluation questions are because otherwise you end up with a bunch of data that you have no idea how to use because you didn't remember why you were collecting it.

Tony Plotner: It is important to have ongoing communication and to meet with supported employment administrators of programs, staff, whoever is involved. You just don't want to say this is what I plan on doing and we will meet when we are all done. Obviously a lot of things can come up. We offer an example on slide 25. Some of those things may not be applicable to you, but it gives you an idea of some of the things that we included.

Kathleen Oertle: Moving on to slide 26 you now have some idea of the data you are going to collect, what questions you are asking, and how you are going to go about making sure your data is of quality. Now you will need to start making sense of the data. This goes back to one of our assumptions – criteria for judging goodness or the quality of the program. Some sources that we like to use are program mission statements, program objectives and goals, and then also taking the field of rehabilitation as another place to have structure of measurement of what best practices are, what field standards are and to merge those two together so that you are making it very personal for that program. You are taking information that you have such as goal setting and mission development and trying to measure how effective we are at putting those particular goals in place and whether or not they are meeting the standards within the field. Based on that we like to take this next form which is on slide 27 – break it down into those areas that you saw on our guiding document and remember those areas can change depending on your questions. In this case we move on to slide 28 as an example. We have taken the three key areas of those questions, we have taken bulleted points from both the mission statements, the objectives, the program and then also those standards within the field and created a list of quality indicators that we will be looking for when we are looking at the data. Again this is this idea of measuring goodness or having a frame of mind in place so that when you have the data you can tell whether or not this is the right direction. What do you do with the findings now that you have them?

Tony Plotner: We are going to talk about what do you do with the data after you have collected the data. In my experience with supported employment programs if they are collecting data they aren't using it. So, this is a very important piece. We talk about recommendations. I suggest summarizing three to five points that you feel are most important in the evaluation – things that you want to remember, you want others to remember, and five recommendations that follow those findings. We talked about reporting. I think communication methods will depend on your audience. There are a variety of possibilities that exist – graphs, written reports, short summary statements, wall charts. We found that a lot of the direct service staff don't want to read a 30 or 40 page written report so we find different ways to present and organize that data.

Kathleen Oertle: Once you said that, if you have a director of staff involved in your data collection and the evaluation project itself, there may be ideas of how to present their pieces of it to their own

peers and to the supervisors of the program. Sometimes they can give you ideas of how to make it user friendly.

Tony Plotner: Now we have action planning and implementation. If we agree that the underlying purpose of evaluation is promoting understanding and learning about the program then the ultimate result is to articulate what we have learned and what we will do as a result of these insights based on recommendations and findings. It is not useful unless you actually do something about it. Kat has talked about the ongoing evaluation and how we are believers that your initial evaluation will be a springboard for continuing an ongoing evaluation for program improvement. It is not that hard to keep the evaluation going.

Kathleen Oertle: I think at this point out of respect for your time we are going to skip forward past our field experience. Slide number 30, 31 and 32 really are representative of a composite of our experiences out in the field through evaluation. We do want to at least have a chance for a few questions if you have them. If that is okay with you Tony we are going to go ahead and jump to a conclusion. We are going to go ahead and skip over to slide 33.

Tony Plotner: Kat and I actually thought about how our teleconference today would be useful to your program evaluation and perhaps in another teleconference we can talk about all the interesting findings that we found from other evaluations. In conclusion I think it is important for everyone to work toward program improvement. We talked about the fear of staff thinking they are getting a “report card” and maybe they are not doing what they should be doing correctly. Nobody likes that kind of environment. I think to get everyone on board it is important to convey why you are doing the evaluation. Learning and improvement is an important piece. We want to integrate evaluation into the way you work. You should always be evaluating the things you do – it should be an everyday practice. You want to build an evaluation up front. The majority of our talk today was about planning and how important the planning is. Also, you want to ask tough questions, make measurements meaningful, and be accountable. You want to use the results to be positive with everyone involved. It is not a show and tell. It is to improve your services.

Kathleen Oertle: Finally, on slide 34 –some sources of more information. I had mentioned earlier in our talk with you today the Joint Committee on Standards for Educational Evaluation. Their Web site is listed here for you. This is an organization that sets the standards within the evaluation field. It has a lot of information on their Web site to get you started on your evaluation. Then the Center for Evaluation – get program evaluation, meta evaluation checklists, and also a lot of other information from the evaluation center and that Web site is there as well. The last two sides are references we used to put this presentation together for you today. We hope that you have gotten enough information today to get you started.

Tony Plotner: We understand this could be a multi-day workshop. We have breezed over a lot of things and hopefully it will generate some discussion with you. If you have further questions we are here. If you have any questions you can e-mail Lynda but make sure they are questions that we can answer.

Lynda Leach, Facilitator: Well, here is one for you. I have an e-mail question. What is the realistic time frame for an evaluation from beginning to end – what to expect?

Kathleen Oertle: In our experience I think you can make the process of evaluation as long as you want it to be. We have had evaluations that we have gone through that have taken as much as eight months from the planning stage where you first start talking about doing the evaluation to the actual results and then implementation and plan of action. That is the long version. However, as Tony had mentioned earlier you can start to look at what are the most important ones and prioritize those questions. If you are talking about ongoing evaluations, from my point-of-view that is something where a time frame may or may not make sense because you might be collecting data that whole entire year. We are reassessing how the budget is going to be set up etc. etc. To answer the question about time frame you do need to go back to what you are evaluating, why you are evaluating, and for whom you are evaluating. That is a vague answer because it is hard to answer that.

Tony Plotner: You can be as ambitious as you would like. I remember our first evaluation – we had some questions that we had to end up cutting and we were still there for several months because it can be a lengthy process.

Kathleen Oertle: It really does go back to that “what,” “why,” and “who” and if you are answering those questions in a much more specific, very focused way then it may take you very little time to focus on that single project. If you are looking at it as an annual sort of ongoing evaluation or even maybe every six months or quarterly then you can see how your questions would change based on the time frame. That is a very good question. Are there other questions for us?

Lynda Leach, Facilitator: I have one more e-mail question. This person says, “I have a small supported employment team of two employment specialists and one job coach. I have program goals for placements and then other milestones for customers to reach for employment retention and then I have program goals and individual goals set for this time. This has turned into one employment specialists versus the other and is not fostering a team approach and she wonders if there are any suggestions to resolve this.”

Kathleen Oertle: If we are understanding this correctly it sounds like there are at least two parties involved and two sets of directions they want to go with the evaluation. Are we understanding that correctly?

Caller: Hi, this is Sandy. I am the one who wrote the e-mail. Actually what happened was I developed the goals for the supported employment program to head our program performance evaluation criteria. I divided our criteria between each employment specialist. If the goal is 30 placements for the year each employment specialist needs to hit 15. Now it is a competition. I am better than she is. She is better than I am in this area and it is completely doing the opposite.

Tony Plotner: It is probably easier said than done to create a team atmosphere. Do they share ideas and have times when they meet and kind of brainstorm with each other about their other caseloads? If they do that I think it would be a little easier to say as a team we have got to get 30 placements. I don't know your structure.

Caller: Yes, we have weekly staff meetings but it is to the point that they thwart job leads from each other because they want to get their number.

Kathleen Oertle: Right, and I guess my thought is on one hand some competition isn't necessarily bad. However, it sounds like it has moved beyond that. There is no sharing of resources. I guess my thought is to reevaluate how you divided up the caseloads and how you are going about measuring their ability to meet these numbers. I think Tony's example of this idea if they have 30 placements how are we as a team going to work on that? I would guess even the person who is not performing up to the same level as the other person has some things they are doing well that other people could learn from and maybe looking at how you are evaluating how they are doing their job in a bigger sense rather than just the outcomes. So, if they don't share leads that becomes an issue. Do you see what I mean? That becomes an issue. That becomes part of how you are looking at how well they are doing their job as opposed to just how many placements did they get. If people are hoarding those contacts and that is somehow limiting someone else in the community employment program from getting a job then they actually aren't helping the program as a whole meet the needs of the consumers. You understand what I am saying?

Caller: Yes.

Kathleen Oertle: That is how I would try to frame it. Probably what you would have to do is talk to your supervisors on how to restructure some of those milestones. I am sure that happens a lot.

Lynda Leach, Facilitator: Well, we are out of time now. Again everyone thank you for being on. If you have any other questions please be in touch with Kat and Tony. Kat would you give your e-mail one more time.

Kathleen Oertle: My e-mail address is on the first slide of the PowerPoint presentation and it is also on our Web site but here it is: oertle@uicu.edu.

Lynda Leach, Facilitator: And Tony your e-mail address please.

Tony Plotner: Mine is plotner@uicu.edu

Lynda Leach, Facilitator: That is great. Thanks so much – a great presentation and some good questions and we enjoyed having you on. We have another teleconference scheduled for next week – November 7 with Amy Dwyre from TransCen, Washington, DC on *College and Beyond: Options for Students with Intellectual Disabilities* so we hope you can join us for that teleconference. Thanks everyone. Have a great day!