Demystifying Evaluation: Meet Your New Best Friend in Change-Making

Dr. Elizabeth Litzler, University of Washington

Elizabeth Litzler, Ph.D., is the director of the University of Washington Center for Evaluation & Research for STEM Equity (UW CERSE) and an affiliate assistant professor of sociology. She has been at UW working on STEM Equity issues for more than 15 years. Dr. Litzler is a member of ASEE and a former board member of the Women in Engineering ProActive Network (WEPAN). Her research interests include the educational climate for students, faculty, and staff in science and engineering, assets based approaches to STEM equity, and gender and race stratification in education and the workforce.

Dr. Cara Margherio, University of Washington

Cara Margherio is the Assistant Director of the UW Center for Evaluation & Research for STEM Equity (CERSE). Cara manages the evaluation of several NSF- and NIH-funded projects, primarily working with national professional development programs for early-career academics from groups underrepresented in STEM. Her research is grounded in critical race and feminist theories, and her research interests include community cultural wealth, counterspaces, intersectionality, and institutional change.

Dr. Emily Alicia Affolter, University of Washington

Emily Alicia Affolter, Ph.D. is a Senior Research Scientist and Equity Consultant for the University of Washington's Center for Evaluation and Research for STEM Equity. She also works as Associate Faculty for Prescott College's Ph.D. program in Sustainability Education. Dr. Affolter's scholarship is rooted in culturally responsive and sustaining pedagogy.

Dr. Emily Knaphus-Soran, University of Washington

Emily Knaphus-Soran is a Senior Research Scientist at the Center for Evaluation & Research for STEM Equity (CERSE) at the University of Washington. She works on the evaluation of several projects aimed at improving diversity, equity, and inclusion in STEM fields. She also conducts research on the social-psychological and institutional forces that contribute to the persistence of race and class inequalities in the United States. Emily earned a PhD and MA in Sociology from the University of Washington, and a BA in Sociology from Smith College.

Demystifying Evaluation: Meet Your New Best Friend in Change-Making

Authors/Presenters: Elizabeth Litzler, Cara Margherio, Emily Affolter, Emily Knaphus-Soran; University of Washington Center for Evaluation & Research for STEM Equity

Abstract

This session will include hands-on learning from a practitioner perspective, meant to develop the capacity of CoNECD attendees to work with evaluators on their diversity, equity and inclusion (DEI) focused projects. Many of the CoNECD attendees are working on grant-funded projects to improve DEI; this session will help them develop a language for program evaluation, provide some promising practices for working with an evaluator, and help them make sure that they have even more impact as a result of a successful evaluation relationship. The session will help guide attendees to make sure the evaluator's lens is calibrated to the DEI project, and will ensure that evaluation recommendations are substantively based in DEI theory and practice.

We will discuss promising practices on setting expectations for evaluation, and for evaluation of DEI specifically. We will help attendees work through how to create a logic model. This exercise will share the language used in evaluation, which can help them to develop a broader vision for their DEI project. It also helps attendees to have a common language with evaluators, and work more efficiently. Finally, we will focus on how to interpret evaluation results, how to lean on the evaluator to improve understanding and action on the results, and what kinds of impact evaluation findings can have.

Specifically, the session will address the following questions:

> What evaluation expectations do you have and how can you come to a common understanding with your evaluator?
>
> What is a logic model, and how can it help ensure your project success?
>
> What should you do with your evaluation results?
>
> How can your evaluator help you with interpreting results and furthering your DEI project?

Plan for the Workshop session:

Introduction of speakers and expectations for the session (5 minutes)

a. Recognition of Native Land: "We are gathered today on the occupied territory of the Pamunkey and Piscataway people, who have stewarded this land for generations."

b. Introduction of speakers and attendees: Names, pronouns

c. Open with a brief assessment of attendee's experience in working with evaluators.

    i. Ask for a show of hands: Who has never worked with evaluator? Who has had bad experiences with an evaluator? Who has had good experiences with an evaluator? Who wishes their experiences with an evaluator could be better?

    ii. Whether you are totally new to working with an evaluator, you want to improve upon past experiences, or you are curious how you can maximize what you get out of evaluation, this presentation is for you.

    iii. This is your chance to ask an evaluator the questions you have been too afraid to ask in the past.

d. What is an evaluator?

    i. Auditor vs Critical Friend—Most evaluators not here to grade you or to fill out a checklist. An evaluator's role is to holistically measure your impact, identify areas of improvement, and gather data to help you tell your story.

    ii. Formative and Summative Evaluation: definitions and examples

e. Why is evaluation critical for DEI efforts?

    i. A DEI perspective reminds us that good intentions are not enough—we have to attend to impact. An evaluator's role is to assess the impact of your project.

Evaluation Basics (30 minutes)

B. How to set expectations: We will talk about two currents within the broader stream of evaluation: general evaluation expectations and DEI-specific expectations. You have expectations and the evaluator likely has some expectations. We encourage discussion about these things up front. You should expect both the evaluator and the client to advocate for their values and goals here. Especially if you are hiring an evaluator with a focus on DEI issues, there will need to be mutual understanding of how much feedback you want or need related to DEI. (10 minutes)

a. General Expectations: Communication frequency and modes, conflict management (how we will disagree respectfully), how formative feedback is shared (and when), how much background/context is shared and how (see below)

    i. To maximize the benefits of your evaluation, you need to offer as much full disclosure as possible and regular communication. But "regular communication" means different things to different people, and what you have in mind might not be possible with the budget you have.

      ii. Full disclosure includes talking about any problems or challenges you encounter—and not just reporting on your successes. The evaluator can help you turn a challenge into a positive result. Acceptance of the dissonance that comes with sharing problems is useful for improving the project because it helps motivate change.

   b. DEI Expectations: Expect your evaluator to advocate for DEI values, accept that there will be dissonance in the DEI work, and commit to self-reflection when dissonance occurs.

      i. It is helpful to have transparent conversations about expectations to subvert any hidden assumptions. The assumptions of those with power are often the ones that trump all others, even if they are unaware of this. If we want to live our DEI values, we want to co-create expectations by being explicit and having up-front conversations.

      ii. Consider this situation: In a project focused on gender in STEM, the evaluator sees issues for the women of color who are participating. In the same project, there are inappropriate comments being made in the classroom about Muslim students. How do you want your evaluator to bring these to your attention (assuming you do)? How can you make those values explicit from the start?

   c. Negotiations: Reporting formats, Changes to the scope of work, Matching the scope of work to your budget

C. Activity with a partner: Brainstorm your own expectations of evaluators in both areas (general and DEI specific) on the provided handout (5 minutes)

   a. What might you need from your evaluator to help hold you accountable to your DEI goals?

D. Discussion and sharing of our lists, clarifying questions (15 minutes)

Logic models and their usefulness (25 minutes)

A. Pass out a blank copy of a logic model

B. Describe the components of a logic model [context, inputs, activities, outputs, outcomes (short, mid, long term); metrics are optional] to create a shared language for attendees. Acknowledge that this is the way we construct and understand logic models, but other evaluators may have slightly different approaches. Utilize "so-that" chain statements to help people understand how logic models work. (5 minutes)

   a. One key benefit of co-creating a logic model with your evaluator is coming to semantic consensus and building shared vision. Building shared vision with your evaluator will embed their insights, experience, and knowledge into your project, build trust in your relationship, and make sure that you are all on the same page.

   b. You can also use this as an exercise before you engage an evaluator to help you get clear on what you are planning and what you expect to happen because of your intervention. Or if you can't afford an evaluator, this exercise can help you narrow down your outcomes so that you only have to measure a few things to evaluate your project.

     c. Depending on the project, consider articulating individual, institutional, and systemic expected outcomes, because all are critical for making DEI progress. If you are too individual-focused without considering the systemic implications of your work, then you may forget how DEI operates within larger systems of power and privilege. Conversely, if you are too institutional-focused you may miss impacts occurring at the individual level. Consider the use of models such as the social-ecological model to ensure focus on all levels of change.

C. Activity: Fill out one activity, one output, and one outcome for a current project you are working on, or one you are planning, ideally related to DEI improvement (10 minutes); presenters will circulate to help with questions.

D. Discussion: What did you struggle with when filling in your logic model? What was an a-ha moment for you? (10 minutes)

How to use evaluation results to further your DEI project (20 minutes)

A. Interpretation as an Art
While some are highly self-critical of their DEI efforts and others are quick to celebrate efforts with low to moderate impact, external evaluators can help interpret your DEI efforts with skill and a critical eye. An evaluator can help you hold up a mirror to your project, encouraging an honest look at your work, so you can increase its efficacy in the long run. But you have to be ready to see what is in the mirror. One way that evaluators can help you understand your impact is by working with you to co-create benchmarks or metrics that would signal success for your project. They also often have experience from other similar projects and can use that knowledge to help you understand if your results are typical. (5 mins)

     a. If evaluation data shows negative results in the beginning, remember that this is not a bad thing—the most important piece of a change project is achieving your goals, and so negative results in the beginning help you to revise your project to be more successful. Evaluators can help you to turn negative results into motivations for change.

     b. Sometimes what appears as a negative result may be the result of your metrics, and your evaluator can work with you to adjust. (Can provide example: When working with a professional development program for early-career women in biological sciences, the quantitative metrics measuring participants' career satisfaction initially decreased upon attending the program. Follow-up qualitative data collection found that this dip was the result of consciousness-raising, as the program raised their awareness of the discrimination and bias they were facing in their field.)

B. Formative evaluation data: Formative data can sometimes be hard to hear (whether DEI focused on not), so it is important that you adopt a stance to be critically reflective of your work, and accept feedback from a growth mindset. Evaluation allows you to make data driven decisions that are timely. (2 mins)

C. Summative evaluation data: How to use it. (3 mins)

      a. Dissemination gives visibility to your efforts that may inspire and motivate more change.

      b. Increases organizational support for your work.

      c. Helps build validity to the findings (never a prophet in one's own land).

      d. Helps secure new or maintain existing funding for your project.

      e. Coupled with actionable recommendations, can drive change.

D. Discussion question for audience: We've all had the experience of getting results, and then having them/the report, sit on a shelf collecting dust. If the evaluator offers up a meaningful insight about your department/workplace culture, for example, how might you imagine engaging with it and keeping it in play to make change? (10 mins)

Synthesis (10 minutes)

A. Questions and Answers

B. Takeaways – from presenters and from audience members