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FERA [Formative Evaluation Research Associates]

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Key Strategies Evaluation Indicators Worksheet

In the spaces below, please indicate up to four strategies you think are critical to the success of the Presidents' Summit. Then briefly describe why you think each is critical. Next, suggest evidence which would indicate to you the success of the strategy.

Strategy 1:	Why Important
Evidence of Success for Strategy 1	

Strategy 2:	Why Important
Evidence of Success for Strategy 2	

Strategy 3:	Why Important
Evidence of Success for Strategy 3	

Strategy 4:	Why Important
Evidence of Success for Strategy 4	

**STRATEGIC PLANNING GROUP MEETING
WEDNESDAY, MAY 15, 1996
8:00 A.M. - 10:00 A.M.**

AGENDA

- 8:00 a.m. ♦ Focus and Agenda for the day—Gregg and Pat
- 8:15 a.m. ♦ Introduction of FERA and the FERA team
 - ♦ Overview of purposes and agenda for FERA's presentation.
- 8:30 a.m. ♦ Evaluation overview
 - ♦ Uniqueness of project and evaluation
 - ♦ Evaluation Basics
 - ♦ Evaluation benefits
 - ♦ Evaluation types
 - ♦ Evaluation process
 - ♦ Critical characteristics of evaluation
 - ♦ Identification of strategy and outcome success indicators
 - ♦ Key Curiosities
 - ♦ Reporting Recommendations
- 9:50 a.m. ♦ Summary and Next Steps



Formative Evaluation Research Associates

FERA'S MISSION

FERA is dedicated to enhancing the performance of non-profit organizations committed to improving the quality of life for any person.

FERA'S GUIDING PRINCIPLES

- ◆ Continual, collaborative client involvement;
- ◆ Constructive, non-threatening, evaluation;
- ◆ Evaluation focused on utilization;
- ◆ High quality performance in every aspect of our work;
- ◆ Continual learning and service improvement.

FERA'S SERVICES

- ◆ Evaluation of educational, social, and association programs
- ◆ Design and facilitation of the strategic planning process
- ◆ Teaching about evaluation and strategic planning

FERA'S RESOURCES

FERA combines the talents of many people into project teams. Our staffing levels are flexible, depending on the number of projects being implemented. Currently FERA is staffed by its president and founder, three senior associates, three associates and two assistants, all with different disciplinary backgrounds. Their work is facilitated by four support personnel.

FERA is a home-based corporation with a small central office. Staff members are fully equipped with computer and communication capabilities which allow them to interact electronically. We encourage clients to join us on-line to take advantage of this time and resource-saving means of communication.

FERA has special expertise in facilitating the use of evaluation information. We believe that our formal reports are one part of a larger communication process. We emphasize active client/stakeholder involvement in the evaluation design process and offer interpretation workshops and action planning sessions as an integral part of our services.

FERA'S CLIENTS

FERA works exclusively with non-profit organizations. We work locally, throughout the State of Michigan, nationally, and internationally to implement our mission. Foundations, community-based organizations, schools, government agencies and associations are typical FERA clients.

Some Recent and Current FERA Projects

Council of Michigan Foundations Kellogg Challenge Grant Grand Haven, Michigan

The Council of Michigan Foundations Kellogg Challenge Grant, funded by the W.K. Kellogg Foundation, is a service agency designed to stimulate community foundation growth and involve youth in solving community problems. The evaluation is threefold. First, the formative evaluation provides information for program improvements and planning. Second, the impact evaluation is focused on the growth of community foundations and the giving behavior of youth. Third, the longitudinal study spans ten years, 1992-2002, and follows current and former participants of the Youth Advisory Councils.

Junior Achievement's Applied Economics Program in Russian High Schools Moscow, Russia

The goal of the Applied Economics Program is to provide economic education to a broad spectrum of the Russian population, create positive public attitudes about business and free enterprise and give Russian high school students life-long knowledge and practical experience in business. The plan for 1994-1995 was to involve approximately 80,000 Russian high school students and approximately 2,000 high school teachers from 23 regions of the country in the program. The final evaluation design helped Junior Achievement answer key questions regarding issues of program implementation and the impact on students and teachers. It was a posttest design with four experimental groups and a control group.

Points of Light Foundation Volunteer Center Development Project Washington, D.C.

The Volunteer Center Development Project (VCDP), funded by the W.K. Kellogg Foundation, is a national effort to strengthen and expand the system of Volunteer Centers across the United States. The primary goals are related to developing and promoting a shared vision for the Volunteer Centers of the future that positions them as leaders in their communities to help address serious community problems. The primary purpose of the formative evaluation is to provide information for the improvement of VCDP activities (capacity builders, academies). The summative evaluation focuses on collecting evidence to document and help explain the early impact of the VCDP on the Volunteer Centers.

**Michigan Nonprofit Association
Lansing, Michigan**

The Michigan Nonprofit Association (MNA), funded by the W.K. Kellogg Foundation, is an effort to increase voluntary giving and service and strengthen Michigan's nonprofit sector. MNA is a merger of three organizations—MNA, the Volunteer Centers of Michigan and the Michigan Campus Compact. The evaluation of the three components is focused on process and outcome indicators.

**American Humanics
Kansas City, Missouri**

American Humanics (AH), funded by the W.K. Kellogg Foundation, is a four-year Campus Expansion Project to prepare college students to work for non-profit agencies that serve youth and families in underserved areas of the nation. The project employs a total quality management approach to improvement. This approach provides on-going input and feedback to AH administrators on key project activities as they are being developed and implemented. The evaluation was designed to establish measures to assess the success of these activities as well as project outcomes.

**Points of Light Foundation
Health Sector Survey Project
Washington, D.C.**

The Health Sector Survey Project, funded by the American Cancer Society, is a joint project with the National Health Council. The project's purpose is to determine the scope and specific characteristics of volunteerism within voluntary health organizations, best practices, and challenges facing volunteerism in national voluntary health agencies who are members of the National Health Council. The evaluation component includes a nation-wide survey, five case studies and the facilitation of an action planning meeting.

**Family Match Program
Spectrum Human Services, Inc.
Southfield, Michigan**

The Family Match Program (FMP), funded by The Skillman Foundation, is an innovative approach to affecting remedial behavioral change within the family unit. The FMP matches client families with mentor families. The formative evaluation describes and assesses the operational aspects of the program's management and administration. The summative evaluation assesses the impact of the FMP on its clients and appraises the degree of the FMP on its clients and appraises the degree to which the FMP has attained its stated goals.

**WTVS/Channel 56 City for Youth Project
New Work for a New Generation
Detroit, Michigan**

This project evaluated the impact of a five-part television series on "New Work" on high school and adult education students. This innovative concept encourages people to consider alternative career choices more in line with their interests and life goals. The evaluation showed that students learned considerable new information from the series. The series also stimulated thinking about New Work and students' future career choices.

POTENTIAL BENEFITS OF EVALUATION

LEARN ABOUT, DEVELOP AND IMPROVE THE PROJECT

Before:

- ✓ ♦ Assess needs, supports, and potential problems to improve the design of the project.

During and After:

- ✓ ♦ Gather feedback during the project and make ongoing changes based on this feedback.
- ♦ Encourage project participants to reflect on and learn from their experience.
- ♦ Learn what worked, what didn't, and why.
- ♦ Learn how you might improve the project next time.
- ✓ ♦ Understand how well the project was received
- ✓ ♦ Understand what the project's effects were.

HELP OTHERS START SIMILAR PROJECTS

- ♦ Inspire/motivate others to do a similar project.
- ✓ ♦ Help others learn from your experience.

REACH/INFLUENCE/INFORM OTHER PEOPLE

- ✓ ♦ Raise awareness and inform people about the project.
- ✓ ♦ Increase interest in/commitment to the project.
- ✓ ♦ Provide information/evidence to respond to critics of the project.
- ✓ ♦ Demonstrate the worth/merit of the project to potential funders or supporters of the project.
- ✓ ♦ Certify to someone (e.g., a funder) that the project's activities have been carried out and that its objectives have been achieved.

Types of Evaluation

There are many types and models of evaluation. The five models below capture the purposes for most evaluations.¹

1 Needs and Feasibility Assessment.

These assessments occur before the program begins. A needs assessment identifies a demand for new services or gaps in already established services that need to be met. These needs lead to establishing goals, objectives, program activities, program structure, and resource requirements. Feasibility assessments focus on whether the activities proposed are possible and whether the proposed objectives are achievable within a stipulated period of time.

2 Program Monitoring.

Although monitoring is distinguished from evaluation, it is the least acknowledged, but probably the most practiced category of evaluation-related activity. Monitoring involves relatively straight forward "tracking" of services delivered and "counting" of clients. Monitoring may be similar to a process evaluation and describes the course of the project and its activities, staff

requirements, and other resource requirements.

3 Formative (Process) Evaluation.

These evaluations provide information for program improvement, modification, documentation and management. The intent is to strengthen the program by providing feedback on its implementation, progress and success. Useful information is collected early in the program so that changes can be made which will enhance program effectiveness, rather than waiting until the program is over. This is useful for all programs, but is especially appropriate for those lasting for several years. This type of evaluation also describes the program in sufficient detail so that others may adapt it to their own situations.

4 Context Evaluation.

These evaluations are intended to provide information about the setting or environment in which the program is implemented. Context evaluation can assess how

certain settings contribute to or impede program success. Important context considerations include the specific needs of the individuals targeted by the program as well as social, political, economic, geographic and/or cultural factors.²

5 Outcome (Impact) Evaluation.

This type of evaluation measures the extent to which the program's stated goals and objectives were achieved and determines any unintended consequences of the program and whether these were positive or negative. Outcomes can be viewed as short term or longer term. Sometimes comparison or control groups are used in impact evaluations. Outcome evaluations are important to making major decisions about program continuation, expansion, reduction and funding.

¹ Based on materials originally developed by the Evaluation Research Society and adapted by the Skillman Foundation, *A Guide to Evaluation for Skillman Foundation Grantees*, Detroit, Michigan.

² W.K. Kellogg Foundation, *Program Evaluation Manual* (Battle Creek, MI: The W.K. Kellogg Foundation, 1989).

FERA's Approach to Program Evaluation

1 Design

◆ Diagnosis

- Identify Stakeholders
- Identify Program Goals, Describe Activities
- Clarify Information Needs
- Identify Appropriate Data Sources
- Identify Key Audiences
- Identify Appropriate Reporting Procedures

◆ Planning

- Determine Key Evaluation Questions
- Select Data Sources
- Select Appropriate Research Methods
- Establish Timeline, Schedule and Budget
- Determine Information Use Opportunities
- Produce Evaluation Plan

2 Implementation

◆ Data Gathering

- Design the Instruments and Procedures
- Conduct Data Collection

◆ Data Recording

- Organize Data
- Create a Database
- Verify Data

3 Data Analysis / Interpretation

- ◆ Code Data
- ◆ Comprehensive Data Analysis
- ◆ Organize Data for Interpretation
- ◆ Present Preliminary Information
- ◆ Facilitate Interpretation/Learning

4 Reporting

- ◆ Report Findings to Stakeholders
- ◆ Report Findings to Key Audiences
- ◆ Gather Reactions
- ◆ Incorporate Reactions
- ◆ Finalize Reporting Product(s)

5 Utilization

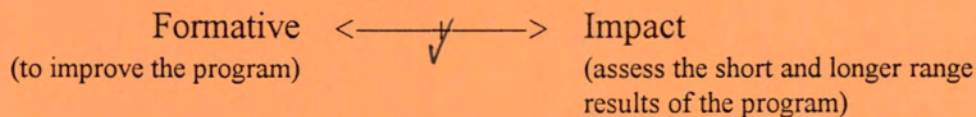
- ◆ Deliver Reporting Product(s)
- ◆ Facilitate Strategic / Operational Planning

Evaluation Plan

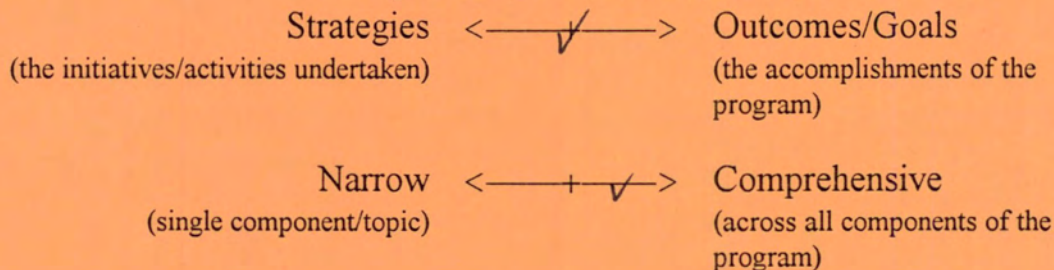
- I. Description of Program
- II. Purposes of the Evaluation
- III. Evaluation Questions
- IV. Data Collection Procedures
- V. Data Analysis
- VI. Reporting
- VII. Schedule
- VIII. Budget

Critical Characteristics of Evaluations

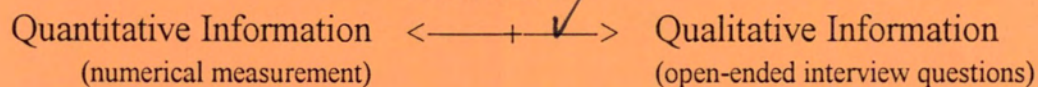
Purposes



Scope of the Evaluation



Evidence



Feedback

