Evaluation Techniques for the Performance Technologist

Instructor: Minjuan Wang, Ph.D.

Class Meeting Time & Place: 1600-1840 (Wednesdays)

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Office Hours: Arranged by Appointment

Course Prerequisites: EDTEC/LDT 540 & EDTEC/LDT 541. Recommended: ED 690

Course Overview
LDT 680 is a practicum that orients you to fieldwork. You will consult with clients, familiarize yourselves with the high-tech tools on which today’s evaluators rely, and read and reflect on evaluation theory and practice. It has a performance technology spin. Just like the real world, client challenges will vary; as important, few will be crystal clear. Our role is multifaceted: facilitator, mentor, advisor, sounding board—and more. You’ll emerge from this course ready not only to design, develop, and implement performance interventions—but also to determine their worth or merit … and ways to improve them.

LDT 680 is organized around four phases:

Phase 1: Planning the evaluation. Here you’ll concentrate on the frameworks and approaches that guide the evaluation process, the strategies or methods by which planning decisions are made (and the stakeholders with whom you must consult), and the enablers and constraints that inform your choices.

Phase 2: Collecting data. Here you’ll focus on building (or adapting/adopting) tools/instruments for gathering the information you need. This is where you determine your information resources (and from whom you need approval to access them), whether or not sampling is appropriate (and the steps involved in selecting samples), technologies that can streamline data gathering without compromising reliability and validity, the most opportune time for data collection, and techniques to ensure people (or organizations) aren’t put at risk.

Phase 3: Analyzing and interpreting the data. Here you’ll focus on the quantitative and qualitative methods by which your data may be analyzed, how to triangulate information drawn from multiple sources or via varying methods, and what the results “mean.” An evaluation study is organized around questions to be answered or issues to be addressed; thus, your goal is to ensure that the data you’ve collected and the interpretations from your analyses “align” with your original investigative intent. You may also learn things that you hadn’t anticipated—what some refer to as unintended results.

Phase 4: Reporting. Here you’ll focus on ways to present your work to clients who themselves may know little about evaluation. Your task is to develop a writing style that is both professional and conversational, aesthetically pleasing, and visually astute. Graphics, charts, tables, and figures are key to preparing a report that is both accurate and easy to digest.

Course Goals and Competencies
At the close of LDT 680 you will be able to:

• Assess the purpose(s) for which an evaluation is to be conducted, and the basis upon which that choice is made.
• Describe the various roles an evaluator assumes—depending on the type of evaluation being conducted
and the politics of the setting.

- Identify and explain (compare/contrast) several evaluation models, frameworks, or approaches.
- Select an appropriate evaluation design—one that reflects client interests and the organizational setting or context.
- Familiarize yourself with the productivity tools (spreadsheets, databases, web editors, survey generators, statistical or qualitative analysis programs or plug-ins) essential to well-conducted evaluation.
- Determine from whom to collect data and how respondents, participants, or artifacts may be selected.
- Locate or develop instruments/tools appropriate to the context (surveys, focus group guides, observation protocols, content analysis rubrics, action plans); determine strategies for making such choices.
- Develop a rationale for review of existing data — old surveys, database records, program or project reports, technical or design specs, etc.
- Assess the reliability and validity of any instrument you choose to administer or implement.
- Assess which technologies can make data gathering more efficient without compromising reliability and validity.
- Select and apply appropriate data analysis procedures … and then interpret/infer meaning from the results.
- Draw conclusions and making utilization-focused recommendations from the findings.
- Use project management concepts and processes to control the scope, schedule, and cost of an evaluation project.
- Use professional resources (e.g., Love Library, the web, and local professional associations) to gather information and establish professional habits and relationships.
- Work independently and with others to sharpen interpersonal and communications skills.
- Familiarize yourself with the “codes” or “guidelines” that guide evaluators in the field (performance/competence, personal behavior, professional conduct).
- Conduct yourself in a manner that demonstrates understanding of the codes and guidelines noted above.

**Texts**

**Required for Campus:**

Essentials of Utilization-Focused Evaluation  
Author: Michael Quinn Patton  
Publisher: SAGE Publication, Inc. (2011)  
Kindle or Paperback edition

**Course Assignments**

**Attendance and Participation:**

We expect (and certainly appreciate) your weekly attendance, promptness (with deliverables, etc.), and active participation. We anticipate that you’ll have read assignments prior to class and come prepared to share your opinions of and reactions to them.

Take full advantage of the opportunities this class affords—from meeting evaluators in the field to examining how the evaluation function unfolds in all sorts of organizations (K-12 schools, colleges and universities, the military, government, the corporate sector, etc.). The connections you make and the competencies you acquire in this course will positively affect your marketability—your readiness to take on interesting, challenging and well-compensated organizational (or consultative) roles.
Requirements/Assessment:
Your final grade is primarily determined by your performance on class assignments/projects. We reserve the right to add or modify the work as the class unfolds; unanticipated events can obviously affect what happens from week to week. The following depicts the preliminary breakdown of work for the course and each assignment’s contribution to your total grade.

Major Project
You’ll be conducting an evaluation for a real client—a task that involves data collection, analysis, and reporting. The project allows you to walk through the entire evaluation process: contextualizing the evaluation object; conducting a brief lit review (to inform how you’ll proceed); determining major issues to investigate; and collecting and analyzing data and inferring meaning from your findings.

As important the project helps you connect theory and practice … and provides first-hand experience with developing and “administering” (implementing) several different tools — for example, a rubric to assess documents or extant data of some kind, a brief survey, an interview guide, or an observation protocol.

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<th>Activity</th>
<th>Description</th>
<th>Points</th>
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<td>Lit Review</td>
<td>Research cannot be undertaken without a thorough review of the literature. Specific parameters of the assignment will be provided in class — along with example papers. In essence, you’ll produce a structured white paper or technical report that generally conforms to APA guidelines</td>
<td>50</td>
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<td>Eval Plan</td>
<td>The evaluation plan is what guides the conduct of your study</td>
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<td>Instruments</td>
<td>These are the tools that you will build (or “adapt/adopt”) to collect your data.</td>
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<td>Final Report</td>
<td>This is the vehicle by which you present a coherent explanation of the data you collected, and your interpretation of the analysis</td>
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Other Requirements

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<td>Team Reports</td>
<td>You’ll complete a Team Report during the semester. The report focuses exclusively on your evaluation project/study—and is associated with a specific deliverable (or set of deliverables). You’re asked to rate your own performance—and that of your teammate, and then detail major accomplishments, challenges you’ve faced and overcome, etc.</td>
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<td>Practice creating tests and surveys</td>
<td>Though you’ll have several in-class activities to complete, the practice survey and practice test are the most substantive—so think of them as assignments … not merely an opportunity to work with new and interesting tools.</td>
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For Students with Disabilities
If you are a student with a disability and believe you will need accommodations for this class, it is your responsibility to contact Student Disability Services at (619) 594-6473. To avoid any delay in the receipt of your accommodations, you should contact Student Disability Services as soon as possible. Please note that accommodations are not retroactive, and that I cannot provide accommodations based upon disability until I have received an accommodation letter from Student Disability Services. Your cooperation is appreciated.