Evaluation Capacity Building in Widening Participation Practice

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Overview
Context & pilot findings
WP focus
Evaluation focus
Tool kit
Evaluation
RUFDATA
What next?
Final thoughts

Overview

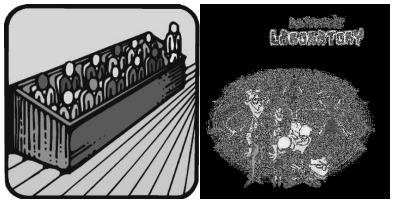
- Evaluation
- HEFCE Context and pilot findings
- Widening Participation
- Evaluation
- Tool Kit
- Mini Methods
- RUFDATA
- What next?
- Final thoughts:

HEFCE Context

- Embed a robust culture of evaluation
- Rich and varied diagnostic evidence
  - **how WP is achieving institutional and external goals**
  - **differential effects on target population**
- A contribution to identified outcomes about probable, plausible connections
- A focus on the longer term impact on attainment and access
  - **Pre entry aspiration and attainment raising activities**

HEFCE Context

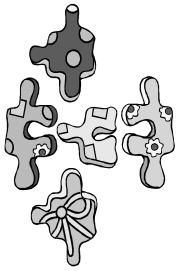
- Rich and varied diagnostic evidence

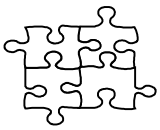


- A balance of the evidence
- To a reasonable person – it seems probable, plausible that this has made a difference

HEFCE Context

- Evaluation plan can build a bigger picture of impact at different levels over time
- Sharing plans with others to help build a more robust and coherent plan





An evaluation plan

Document outlining

- What you will evaluate – foci
  - **Activity**
  - **Specific group**
- When you'll do this
  - **A timeline of how often and when in the year**
- Justification of what you propose to do

An evaluation plan

What (Foci)	When – (Time)	Why – (Reason, purpose and Use)
Financial Knowledge	**Year 1 May (Yr 9, 11)** **Year 2 Nov (Yr 12, 13)**	**To report to teachers for financial literacy project** **To inform HEIs about finance advice and bursaries re OFFA**
Living away from home	**Year 1 Dec Yr 10**	**To inform activity design on Summer Schools** **To assess impact of new SS**
Parental Perceptions	**Year 1 & 3 Cohort of parents from HEI A and B**	**To respond to concerns identified in Report X and success of pilot projects at HEI A and B**

CSET Capacity Building

Overview
Context & pilot findings
WP focus
Evaluation focus
Tool Kit
Evaluation
RUFDATA
What next?
Final thoughts

- 6 Capacity building workshops
- 6 HEI and 2 Aimhigher Consultancies
- Toolkit

- Pilot Study
  - **WP Evaluation Capacity Building Project 2007**

WP Evaluation Capacity Building Project 2007

Overview
Context & pilot findings
WP focus
Evaluation focus
Toolkit
Evaluation
RUFDATA
What next?
Final thoughts

- The four universities very positive about their participation
- Contexts varied
  - **e.g. responsibilities and resources**
- Project valuable in itself
  - **a reason for different people in a university to meet together.**

WP Evaluation Capacity Building Project 2007

Overview
Context & pilot findings
WP focus
Evaluation focus
Toolkit
Evaluation
RUFDATA
What next?
Final thoughts

- Centrally managed and loosely co-ordinated WP programmes
- 'Selecting' or 'recruiting'
- Economic necessity or social responsibility
- Started with a situational analysis
- This shaped the overall evaluation approach

WP Evaluation Capacity Building Project 2007

Overview
Context & pilot findings
WP focus
Evaluation focus
Toolkit
Evaluation
RUFDATA
What next?
Final thoughts

- Current evaluation activity varied
- Mainly pupils'/applicants' immediate response
- Loose links only between evaluation and internal planning and decision-making cycles

WP Evaluation Capacity Building Project 2007

Overview
Context & pilot findings
WP focus
Evaluation focus
Toolkit
Evaluation
RUFDATA
What next?
Final thoughts

- WP 'teams' keen to develop their evaluation activities
- Long term goal of an evaluation strategy
- Short term goal a more co-ordinated, varied and sophisticated 'approach'

Overview
Context & pilot findings
WP focus
Evaluation focus
Toolkit
Evaluation
RUFDATA
What next?
Final thoughts

WP Evaluation Capacity Project 2007

Characteristics of an improved short term, 'evaluation approach'

- WP 'team' to select the methods
- fit for purpose
- easy to do
- flexible
- technically robust
- suitable for range of audiences

Overview
Context & pilot findings
WP focus
Evaluation focus
Toolkit
Evaluation
RUFDATA
What next?
Final thoughts

WP Evaluation Capacity Building Project 2007

Areas of further development

- less routine and more targeted evaluations
- evaluate longer term effects as well as immediate responses
- training in qualitative data analysis
- create an easy to use evaluation 'toolkit'

Activities identified by HEFCE

- Aimhigher campus visits (generic)
- Mentoring (face to face or electronic)
- Subject enrichment , master classes or revision sessions
- HE student ambassadors in school and college lessons and IAG events
- Summer schools and other HE related residential experiences
- School based interventions as part of a programme agreed with schools.

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

RUFDATA : an evaluation planning tool

- **Reasons and Purposes** planning, managing, learning, developing, accountability
- **Uses** providing and learning from examples of good practice, staff development, strategic planning, PR, provision of data for management control
- **Foci** activities, aspects, emphasis to be evaluated, should connect to the priority areas for evaluation
- **Data and Evidence** numerical, qualitative, observational, case accounts
- **Audience** Community of practice, commissioners, yourselves
- **Timing** Coincidence with decision making cycles, life cycle of projects
- **Agency** Yourselves, external evaluators, combination

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

RUFDATA : an evaluation planning tool

- **Reasons and Purposes**
- **Uses**

Foci

- activities, aspects,
- emphasis to be evaluated,
- should connect to the priority areas for evaluation
  - **Data and Evidence**
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  - **Agency**

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

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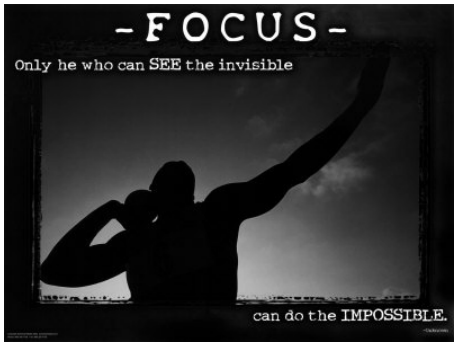


Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

RUFDATA : an evaluation planning tool

- Reasons and Purposes

Uses

- providing and learning from examples of good practice
- staff development
- strategic planning
- links to a wider evaluation
- Public relations
- provision of data for management control

- Foci
- Audience
- Agency
- Data and Evidence
- Timing

Overview
Context & pilot findings
WP focus
Evaluation focus
Toolkit
Evaluation
RUFDATA
What next?
Final thoughts

Widening Participation – clarifying a shared vision

Foci

- What are the main widening participation activities?
  - **In your HEI**
  - **In your Aimhigher Partnership**
  - **other HE related non-Aimhigher developments**

Uses

- How will they contribute to Aimhigher Learner Progression Framework?

Overview
Context & pilot findings
WP focus
Evaluation focus
Toolkit
Evaluation
Mini-Methods
RUFDATA
What next?

Evaluation focus

Understanding

- What do you think of evaluation?

Status

- What is the current status of evaluation in your context?

Purpose

- What do you see as the purpose of an evaluation plan
  - **For you and your work?**
  - **For your organisation / partnership?**

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

RUFDATA : an evaluation planning tool

Reasons and Purposes

- planning
- managing
- learning
- developing
- accountability
  - Uses
  - Foci
  - Data and Evidence
  - Audience
  - Timing
  - Agency

Overview
Context & pilot findings
WP focus
Evaluation focus
Tool Kit
Evaluation
RUFDATA
What next?
Final thoughts

Evaluation Perspectives

Evaluation for accountability

- e.g. measuring results or efficiency

Evaluation for development

- e.g. providing evaluative help to strengthen institutions or projects

Evaluation for knowledge

- e.g. obtaining a deeper understanding in some specific area or policy field

Overview
Context & pilot findings
WP focus
Evaluation focus
Hopes
Evaluation
RUFDATA
What next?
Final thoughts

Definitions

"Evaluation is the purposeful gathering, analysis and discussion of evidence from relevant sources about the quality, worth and impact of provision, development or policy"

Overview
Context & pilot findings
WP focus
Evaluation focus
Tool Kit
Evaluation
RUFDATA
What next?
Final thoughts

Characteristics of an inclusive evaluation

Visions and uses
- participatory approach, democratic vision, authenticity, depictions of experience, inspirational stories

Designs
- making time and space, co-constructors

Ownership
- By-in enables use

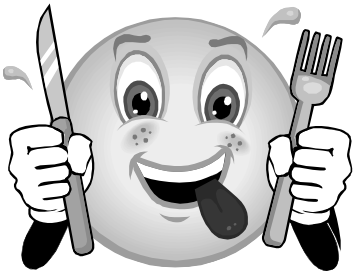
Ethics
- protection, access

Overview
Context & pilot findings
WP focus
Evaluation focus
Tool kit
Evaluation
Mini Methods
RUFDATA
What next?

Tool kit

What would you like to see in the toolkit?
- Topics covered
- Specific resources

Have you anything that you think would be useful for others?



Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Focussing attention on 'levels'

- Level 1
  - **Quality of experience and immediate effects**
- Level 2
  - **Changes in attitude, new knowledge/skills**
- Level 3
  - **Changes in individual practice**
- Level 4
  - **Changes in institutional practice**
- Level 5
  - **Sector wide and macro changes**

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

EPO Performance Indicators

The EPO approach (Saunders,2001) distributes weight between outcomes, processes and enabling factors and sees them all as valid, separate indicators of impact. For example EPO accepts changes in the strategies, systems and practices in and around teaching as evidence of educational impact; assuming that these ultimately will lead to impact on the student experience and approaches to learning and student achievement. This is useful as it is widely accepted that impact on student learning is particularly difficult to evidence.

(Paragraph from: Self-Evaluation – Reading CE-AURS – 2007)

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

What are EPO Indicators?

- ***Enabling*** indicators are concerned with the structures and support which need to be set up or provided to produce the desired outcomes, it might include some capital expenditure or resource implications.
- ***Process*** indicators are concerned with what needs to happen in order to achieve the desired outcomes.
- ***Outcome*** indicators are concerned with the intermediate or longer-term outcomes of a programme and are tied to impact goals.

Helsby,G, Saunders,M Taylorism, Tylerism and Performance Indicators: Defending the Indefensible. Educational Studies, Vol19, No.1 pp55-77, 1993

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

What does 'Learner Progression' mean to you?

(*or any other main topic*)

Creating 'shared understanding of the central issue/s'

A crucial first step!

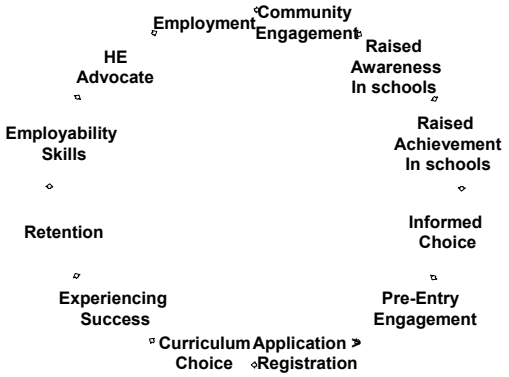
Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

What sort of quantitative evaluation of these issues occurs already?

- Brainstorm current 'counting & measuring' activities. (These could be entered on the time-line or student life-cycle diagram)

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Fast Methods
Analysis
Reporting
RUFDATA
What next?

The Life Cycle of a Student



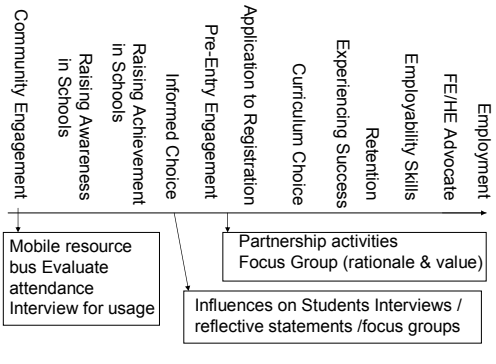
Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

What are you interested in looking at in more depth?

- An initial project may be quite small a pilot idea that can easily be expanded into a more strategic and wide reaching process in the future.
- Start with something manageable and immediately relevant small scale, this will help you to understand the process.

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Evaluation linked to Student Life-Cycle as a 'Time-Line'



Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

A few 'finding out fast' methods

- Dialogues with a purposive sample (face-to-face or telephone)
- Focused Reflective statements (email)
- Focus Groups with a purposive sample (meeting)
- Sequential statement based surveys (post, hand-out or email)
- Interface loops (prior to a focus group)
- Personal reflective practice particularly keeping a professional journal (action research)
- Parallel Writing
- Delphi Studies (sequential case study approach)

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

BERA 2004 Ethical Guidelines

Expectations of respect for:

- The person
- Knowledge
- Democratic values
- Quality of educational research
- Academic freedom

All of these could be described by the single word 'INTEGRITY'

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Dialogic Interviewing

- The interviewer and interviewee have perceived parity of occupational or professional status.
- The interviewer shares personal/professional views on the issues discussed with the interviewee.
- Innovative ideas in relation to the issues are encouraged and developed by the interviewer.
- Unpredictable data is generated through wide ranging discussion.

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Knight & Saunders (1999) 'Understanding Teachers Professional Cultures'

Using a dialogic approach to find out what people thought was meant by the term 'profession', Knight and Saunders reported:

> **'The dialogues which occurred between interviewer and interviewee did not uncover truths or meanings but produced them. Interviewees often reported to us that they had not thought of the term 'profession' much, even though they used, read and heard the word regularly. The interview, then, provided an opportunity for reflexive thinking during which the interviewee undertook a process of construction with the interviewer.' (1999:148)**

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Dialogues (data sequence activity)

Task 1: (Paired activity)

- Think about a negative learning experience you have had in your past and tell your neighbour about it (no more than 3 mins each!).
- (Feedback to group by partner)

Task 2: (Paired activity)

From your dialogue with each other compose 3 or 4 statements about 'negative learning experiences' – these will relate to the 'factors' of this type of situation, eg:

- A negative learning experience destroys self-esteem.
- Negative learning experiences can never have positive learning outcomes.

(I will insert these statements onto 'agree/disagree grid' during the next activity)

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Statements	Agree	Disagree

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

What is a Focus Group?

- A group discussion of a particular topic
- An environment in which to share ideas
- The meeting of a community of practice
- The use of a purposive sample of people to test some general views or ideas
- A group interview
- A lesson
- THIS IS A FOCUS GROUP!

Size of Group

Ideally 6-12 people but could be as small as 4 if they are 'expert witnesses' for example.

With a main question to answer you may form several groups from your purposive sample and then collate the discussions to form a more general opinion.

Selecting the 'participants'

Depending on your subject any or all of the following <u>may</u> be important:

- Age and Gender
- Year group (young people)
- Subject specialism
- Faculty / Discipline
- Role / Responsibilities
- Experience of the issue / topic / question

Source: *Evaluation Toolkit* Aimhigher Greater Merseyside[1] http://www.ahgtm.ac.uk/projects/?page_id=1191

Sample type	Description
Census	All members of the relevant population are included
Random	Sample members selected from the population randomly
Self-selected	Sample is selected when members of the population decide, for example, whether or not to complete a questionnaire
Stratified	Groups, or *strata*, within the population are identified (e.g. learners from different BME groups). Random samples are them taken from each group.
Judgemental (Purposive)	Sample chosen based on evaluator's judgement of who can provide the most valuable information
Systematic	Selection of the nth member of a population or stratum

The Facilitator of a Focus Group

- May be a member of a community of practice that is carrying out 'Action Research' for its own development.
- May be an external researcher with specialist knowledge in the subject area.
- May be a peer researcher seeking additional information for a personal research project.

The Facilitator:

(thinking on your feet!)

- **Should be attentive to the speaker**
- **Use encouraging body language**
- **Reflect back the interpreted thoughts and feelings**
- **Summarise the conversation to give direction**
- **Encourage deeper reflection into such things as – motivation, attitude, feelings, tacit knowledge**
- **Accept constructive silences**
- **Gently pursue the topic after a silence**
- **Accept a change of tack**
- **Accept and encourage development of ideas beyond the initial suggestions**
- **Enable the speaker to reconstruct experience**

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Set the scene

- Explain the research to the group Facilitators role and responsibility The selection process
- Discuss timings and Recording methods
  Create a 'Safe environment'
- Discuss ethical practices Confidentiality and Respect for group 'confessions'

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Starting Points

- Identification Exercise – First name, year group, subjects studied etc.
  (this fixes voices for transcription)
- Main question or issue on a slide or flip chart – keep the focus
- Read the question - ensure shared understanding
  (reading it is best practice for inclusivity)

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Getting Going

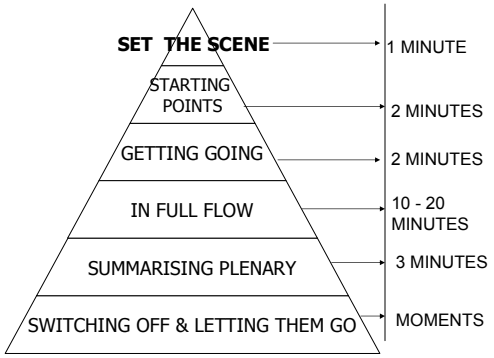
- As part of shared understanding, get each member to give a definition.
- Create a proper 'dialogue' between you and the group. Do not have pre-conceived ideas
- Be ready to say *'Hey that's interesting'*, or *'I hadn't thought of that'* or *'glad you introduced that idea'* etc.

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

In Full Flow

- WHILE THEY ARE TALKING ON TRACK, YOU MAY NOT NEED TO INTERVENE!
- Intervention is for:
  - •Refocusing
  - •Protecting
  - •Empowering
  - •Clarification
  - •Feedback loops
- Continually ensure shared understanding of words, phrases and ideas & look interested!

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?



A 15 minute quality discussion will generate between 3 & 5000 words of rich material that needs transcribing for interpretation and analysis - be kind!

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Whole Group Activity

Focus on:

GROUP 1

- **WHAT MAKES A SUCCESSFUL STUDENT?**

GROUP 2

- **WHAT IS LEARNER PROGRESSION?**

The information from this activity may be used for the RUFDATA session later – make a few notes!

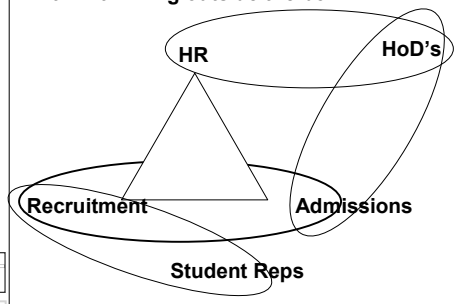
Delphi Studies

- An enhanced form of case study approach.
- Knowledge gained from initial data collection methods within the case study group is shared within the next level of discussion.
- An incrementally developing knowledge base is created. Analysis is synthesised with levels of data collection.
- Ideas raised as the collection period progresses can be shared and tested for validity and acceptance with the next set of respondents.
- A very rounded picture of the 'case' is created as well as 'pre-tested' strategic ideas by the end of the collection period rather than as a result of later analysis.

INTERFACE LOOPS

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

a task that makes people think about who they work with and who they perhaps *'should'* work with – 'thinking outside the box'



Working Together: What sort of Interface?

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Networking - in the same general field of work

Liaison - useful occasional contacts for some work

Co-operation - working towards same ends

Partnership - united for specific goals or activities

Team Work - co-operative partners in same field

Collaboration - shared understanding with mutual respect and reciprocation

Reflective Professional Journal

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

This is not necessarily a 'book', it could be a computer page, or just a pad on your desk.

- **Always date your entries.**
- **Note down ideas before they *'shimmy away'*.**

Use it like a sketch book – record things people say, ideas, notes about useful materials; and as a way to get rid of your frustration about a situation – its amazing how calming '*writing it down*' can be!

Parallel Writing 1/2

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Sally felt relief. She felt she had passed a burden to someone better able to cope with it.

Barbara's the expert. We can sort it out together. She seems to have heard what I have said. Unperturbed but not unmoved. Even though I know she can't know how awful it feels to be drifting apart from your daughter – she's had all the training and read all the books.

Barbara felt frustrated……

If only I could tell her just how much I really know how she feels. I've been there. I am there. But – got to keep everything professional……I am not her friend. God it's hard to keep up this façade. If I don't she'll vote with her feet anyway. I need to find a way of letting her know that she could be me talking.

Barbara remembers back to last week: 'Why don't you leave me alone and drop dead?' her daughter screamed, CALL YOURSELF A COUNSELLOR?!!!

Parallel Writing 2/2

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

This excerpt presents the parallel misrepresentations between counsellor and client in terms of the spatial arrangement of the text on the page, reminding us that our awareness of events and situations is not linear (a single argument) but simultaneous and interlocking, dramatic and ironic.

Winter,R (1999:40-41) *Professional Experience & The Investigative Imagination*, London:Routledge

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Interpretive Analysis (1/2) Ask yourself:

- What do these data sets tell me? 'What is happening here?' (Action Research / Grounded theory)
- Am I sure that 'we' have 'shared understanding' of this issue, are we part of the same 'community of practice'?
- What themes are emerging – are they what I expected? (matrix)
- Is this likely to represent a wider view?
- Can I test this wider view? (statement based survey)

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Interpretive Analysis (2/2) Ask yourself:

How do I know this is right – what other data do I have that supports this idea? (the reason for 'triangulation')

Have I considered my position – how am I perceived, does my hierarchical position affect my respondents, have I tried to make allowances for this?

Is there some theory that will help me to make sense of what is being 'said' in my data? (Educational, Organisational, Reflective Practice)

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Triangulation

Simply means ensuring that your interpretation is drawn from a consideration of more than one source of data.

Although it implies 3 methods of data collection in reality it might be 4 or more sources that you use to create your 'picture' of 'What is happening here?'

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Validity and Replication

'Qualitative research recognises a complex and dynamic social world. It involves researchers' active engagement with participants and acknowledges that understanding is constructed and that multiple realities exist.

Replication in qualitative research has more to do with reinterpreting the findings from a different standpoint or exploring the same issues in different contexts rather than expecting or desiring consistent accounts.

Validity is an integral element. It has to do with the adequacy of the researcher to understand and represent people's meanings.'

(Banister, Burman, Parker, Taylor & Tindall (1994) Qualitative Methods in Psychology, Buckingham:OU Press)

A Matrix as an Analysis Tool

Why did you apply for summer school?	Who or what influenced you to apply?	Inspirations	Challenges
The fact of seeing the university, what the teaching is like basically.	Mostly my parents and I was handed an application at school.	This week was good because I haven't done anything like this before.	I thought it would be just like GCSE with a bit more detail but it was totally different.
See what the lessons are like and see what the accommodation is like.	The standard of the university, how it rates in the country and stuff for my own course in particular.	Obviously I had heard little bits of information before but hearing what the reps said about what they did and how much it helped them.	When we come here we've got to make new friends, this was a taster of that, and we'll be used to it and know what is going to happen.
It was the chance to get away for a week!	Friends – I wasn't too sure if I wanted to go to university – they've helped me.	The sessions and the employer visits kind of opened my eyes to a possible career back-up.	I didn't like the Geography taster session so I don't think I'll be doing it.

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

A report example

1.5 Use of Student Reps:

The student reps are recruited each year to act as mentors to the summer school students, this use of our own students helps the visiting young people to understand more about the potential of a university experience, for example, one student stated

'obviously I've heard little bits of information before but it helped to hear the reps say what they had done and how much it helped them…they are just people like us, it was good to know that.' (year 12 student A) and another said *'one person we spoke to had done work experience there and that's why he got a good job straight away, he told us to try and get work experience when you're at uni and you might be able to get a job from it, so it's good to hear that'' (year 12 student G).*

Not only does this sort of data authenticate findings, but it brings a report to life.

Looking at the collected data in different ways

Respondent and/or type of data	Activity A	Activity B	Activity C in School 1	Activity C in School 2
Student Interviews (Report 1)	X	X	X	X
Focus Group Transcripts (Report 2)	X	X	X	X
Tutor Interviews (Report 3)	X	X	X	X
Observations (Report 4)	X	X	X	⊙

Model of good practice

Case Study

Cross-project snapshot

RUFDATA Categories

- Reasons and purposes
- Uses
- Foci
- Data and evidence
- Audience
- Timing
- Agency

Saunders,M (2000) Beginning an evaluation with RUFDATA:theorising a practical approach to evaluation planning. *Evaluation* Vol 6 No.1 pp7-21

RUFDATA headings (1/7)

Reasons and Purposes

- planning, managing, learning, developing, accountability

RUFDATA headings (2/7)

Uses

- providing and learning from examples of good practice, staff development, strategic planning, PR, provision of data for management control

RUFDATA headings (3/7)

Foci

- activities, aspects, emphasis to be evaluated connected to the priority areas for evaluation

RUFDATA headings (4/7)

Data and Evidence

- quantitative from audit of current activities, qualitative – observational, case studies, tracking/shadowing activities, focus groups etc.

Aimhigher

Evidence Good Practice: Guidance

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

RUFDATA headings (5/7)

Audience

- community of practice, commissioners, yourselves

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

RUFDATA headings (6/7)

Timing

- coincidence with decision making cycles, life cycles of projects

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

RUFDATA headings (7/7)

Agency

- yourselves, external evaluators, combination

Who will be involved and how will they be supported? – (action plan)

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

What next?

Developing an Evaluation Plan

Helping Hands

- **Existing resources**
  - **HEFCE Guidance for Aimhigher Partnerships**
  - **Measuring Success: A guide to evaluation for Aimhigher**
- **CSET Toolkit**
  - **Ideas and feedback**
- **CSET Workshops**

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

What next?

Implementing your Evaluation Plan

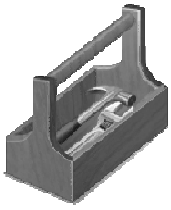
- **Disseminating your findings**
- **Contributing to the evidence base to support continued funding**
  - **Internal**
  - **External**

And when you've done all that Review plan and …

Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Final thoughts

Toolkit



Ideas and suggestions for tools

Feedback on tools

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Morning
Afternoon
Evaluation Levels
Starting
Existing Data
Focusing Fast Methods
Analysis
Reporting
RUFDATA
What next?

Final thoughts

Head

Heart

Bag

Bin