

Evaluation Capacity Building in Widening Participation Practice

The Team:

Paul Davies

Ann-Marie Houghton

Lesleyann Morgan

Linda Pearce

Murray Saunders

Rebecca Marsden and Shealagh Whytock

Lessons from experience of evaluation planning

Derby, 12th June 2008

An overview

Reflections on experience

- A consultants perspective
- An Aimhigher Partnership perspective

Planning constraints and opportunities

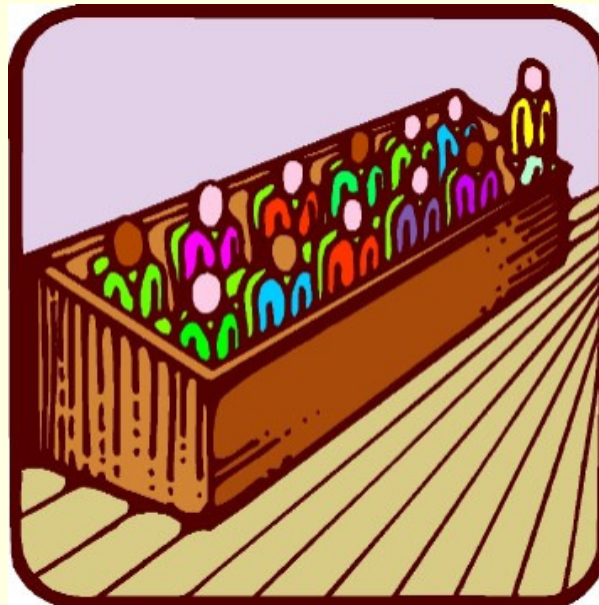
Evaluation Planning

The Toolkit

Individual support

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



Workshop

2A

Overview

Reflection
experience

Planning:
constraints

Evaluation
Planning

Toolkit



HEFCE Expectations para 13

Evaluation Reports

- 1st week September
- Focus on outcomes for learners
- And effects for schools, colleges, stakeholders

Be selective

- Do not try to evaluate everything

Rolling programme

- Core interventions over 3 year cycle

An evaluation plan

Document outlining

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



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Consultancies

Phil Dent	Coventry and Warwick Aimhigher
Sarah Turnbull	Tyne and Wear Aimhigher
Renata Eyres	Salford University
Louise Bohn	East Anglia University
Stephen Boffey	Hertfordshire University
Jennifer Wyatt	Kent University
Anne Richards	Edge Hill University
Silje Anderson	Imperial University

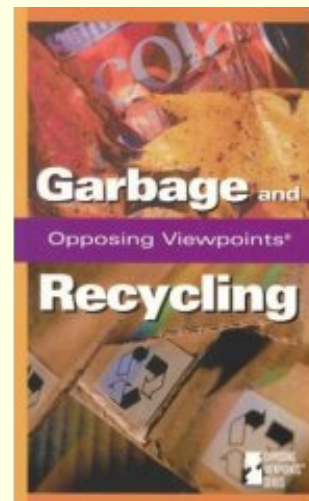
Reflections on experience

Phil Dent

- **Coventry and Warwick Aimhigher Partnership**

Lesleyann Morgan

- **CSET Consultant**



The background features several large, overlapping, curved shapes in shades of purple, green, and blue. Interspersed among these are several small, yellow, triangular shapes pointing in various directions, creating a dynamic and celebratory feel.

Reflecting on Mini-Projects for Evaluation Planning

**Dr.L.Morgan:
Recording the Reflective Process**

Mini-Project 1: Outcomes

Yr 9 perceptions of HE & identification of barriers to HE:

- **Interviewed (focus groups) 22 students in 4 groups all AH students separated by gender to get a specific dynamic.**
- **Schools were selected from the AH cohort. Next time would like to do this with post-16 students.**
- ***'It was lovely to be in a position to meet the students and hear for myself what they said about these issues'* (this project was carried out by an LEA schools AH officer)**
- **Had a set of themes (main questions) that were dealt with by each group as a dialogue**
- **What is important to them is that every child gets a visit to a uni and that transformative skills are given importance in schools.**
- **We need to recognise different aspirations – boys in particular want things other than uni, apprenticeships for example. Girls seemed to have lower aspirations.**
- **The AH cohort still contains a massive range of ability and aspiration.**
- ***'If I knew what I wanted to be then I would know if I wanted to go to uni or not.'***

Mini-Project 2: Outcomes

Gender difference in relation to aspirations and progression to HE:

- What people wanted out of life – hopes, dreams aspirations and desires.
- 40 year 9 AH cohort students (4 separate sessions separated by 2 weeks – in gender groups 20 boys, 20 girls in total) the focus group arrangement was a 'contract of engagement' with the schools.
- What is your dream job? What hopes do you have for your life? What are your expectations of life? What educational aspirations do you have?
- Boys were more communicative than girls – was this to do with the gender of the facilitator?
- This 'research' was generally reassuring as a process and valuable to inform parent sessions particularly about 'selling HE' as a preparation for future life. *'This will have changed my work in schools particularly about how I sell HE as an idea to students and parents – qualifications as security & opportunity.'*
- What boys want is not money for material things but money to reduce worry and stress about debt – getting a job (enjoyable and secure – uni gives the opportunity for this)
- Girls were more materialistic – generally had lower aspirations than boys, wanted to become a WAG, go into hairdressing or beauty therapy although 2 wanted to go into law.
- Each gender group was asked how the other would answer.

Mini-Project 3: Outcomes

- Targeting & recruitment for master classes – matching student expectations:
 - *I will know how to do it better next time – I needed to plan the evaluation into the programme much more, so that student selection for the focus groups can be part of the activity for the day.*
 - *It did work better to have a peer facilitator, although it was harder for them to create a proper discussion. Those who had the focus group facilitation training were much better at it and then it worked really well.*
 - *Out of this discussion came issues about funding for places which we must look at on the strength of this. Also unexpected issues such as how information is given to students. Website design, and timing issues.*
 - *I wish I had recorded the planning meeting with the team, these are sources of data that I am more aware of now. I have really learned a great deal from doing this it's much better than handing out a feedback sheet.*
 - *I also have completed questionnaires and a matrix of statements made in the groups. I am intending to talk to teachers in the schools about master classes and how participation is followed up. I could also talk to parents. The students don't like the name 'master-classes.'*
 - *I will be inviting interested parties onto the campus to present the new programme so that this also raises awareness.*
 - *What can we call them – students suggested 'Funky Jazzy Classes.'*

Mini-Project 6: Outcomes

Investigate the potential for continuation and further roll out of the STAR student game.

- **Student mentors were trained to be facilitators of focus groups.**
- **They returned to schools where children had participated in the game some time before and ran focus groups with these same children to find out what they remembered of the game and how much impact certain aspects had on them in terms of influence and longer term effects. Including what they would change, and whether they would recommend it to other children.**
- **They created a matrix to align the data gathered and this provided further questions to be dealt with by the design team and issues to be considered during current practice.**
- **Results from the focus group training of the student mentors has been very positive, these are transferable skills and gave them far more confidence in terms of their mentoring role and the value of practice research and evaluation.**



General Issues with regard to using RUFDATA as an evaluation framework

- Using RUFDATA categories as initial headings for report writing.
- They provide an appropriate template for all sizes of project.
- They cause a structured evaluation process – it helped with planning the evaluation activity.
- Really good signposting – reminders of what must be covered.

Value of mini-project exercise

- **More understanding of the value of practitioner evaluation activities.**
- **Enlightenment and inspiration**
- **Opened up so many other questions that would not have been apparent without these projects.**
- ***'This will have changed my practice.'***
- ***'Using the student ambassadors, what a good idea – peer researchers.'***
- **Provided professional development about obtaining and using evaluation data strategically to affect practice development.**
- **Developing research analysis skills including report writing.**
- **More understanding of methodological approach to evaluation.**
- **Using the matrix format to analyse data sources and respond to themes. This framework offers a sound resource to reflect on when writing a report.**
- ***'This was not more work, it was exciting and enjoyable and has really helped me to consider issues in my practice.'***
- ***'Reflecting on the data produced is a professional learning process. It adds value to what you collect when you record this reflection in a report.'***
- **Offers the potential to link statistical evidence to the qualitative material and produce a real narrative of experience.**



Relationship between mini-projects and the main evaluation

- This really will feed into the bigger picture planning activity.
- Better understanding of how to plan evaluation activities so that they fit better with practice and are more strategic.
- The whole evaluation plan will use some of the key findings that have come from the mini-projects. This will give us a more robust evidence base to draw on, and the team more ownership and understanding of how the plan was constructed.



Workshop

2A

Overview

Reflection
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Planning
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What can evaluation do?

- Prove
- Measure
- Make a convincing case
- Illuminate
- Describe
- Confirm

Opportunities

- To justify expenditure
- To illuminate complexities of particular situations or programmes
- To highlight strengths and weaknesses
- To show whether a programme is 'on track'
- To show whether objectives have been met
- To establish probable links
- To reach a judgement about the overall effectiveness and value of a policy initiative.



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Constraints

- Finding evaluation hard to 'pin down' – somewhere between monitoring and research
- What and how much to evaluate?
- What counts as evidence?
- Shifting policy environment

Constraints

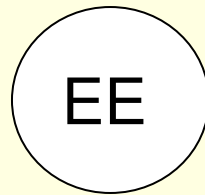
- **Technical difficulties –**
 - the level of sophistication required for data collection and analysis
- **Time difficulties**
- **Motivational difficulties –**
 - Do we really have to do it?
 - who benefits?
- **Engagement difficulties /co-operation both within teams and wider institution**

Moving Forward

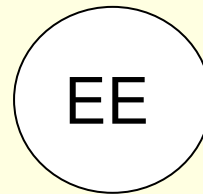
- **Someone who can manage quantitative data – not sophisticated analysis – mainly collection, ordering, and presentation**
- **Someone who can manage qualitative data with a degree of authority – using categories as a basis of analysis, identifying patterns and themes**
- **Someone with an overview and who will make it happen**

Evaluation Plan – version 1

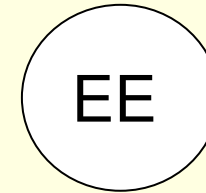
Year 1



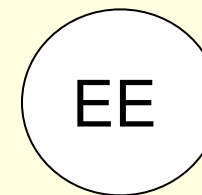
Year 2



Year 3



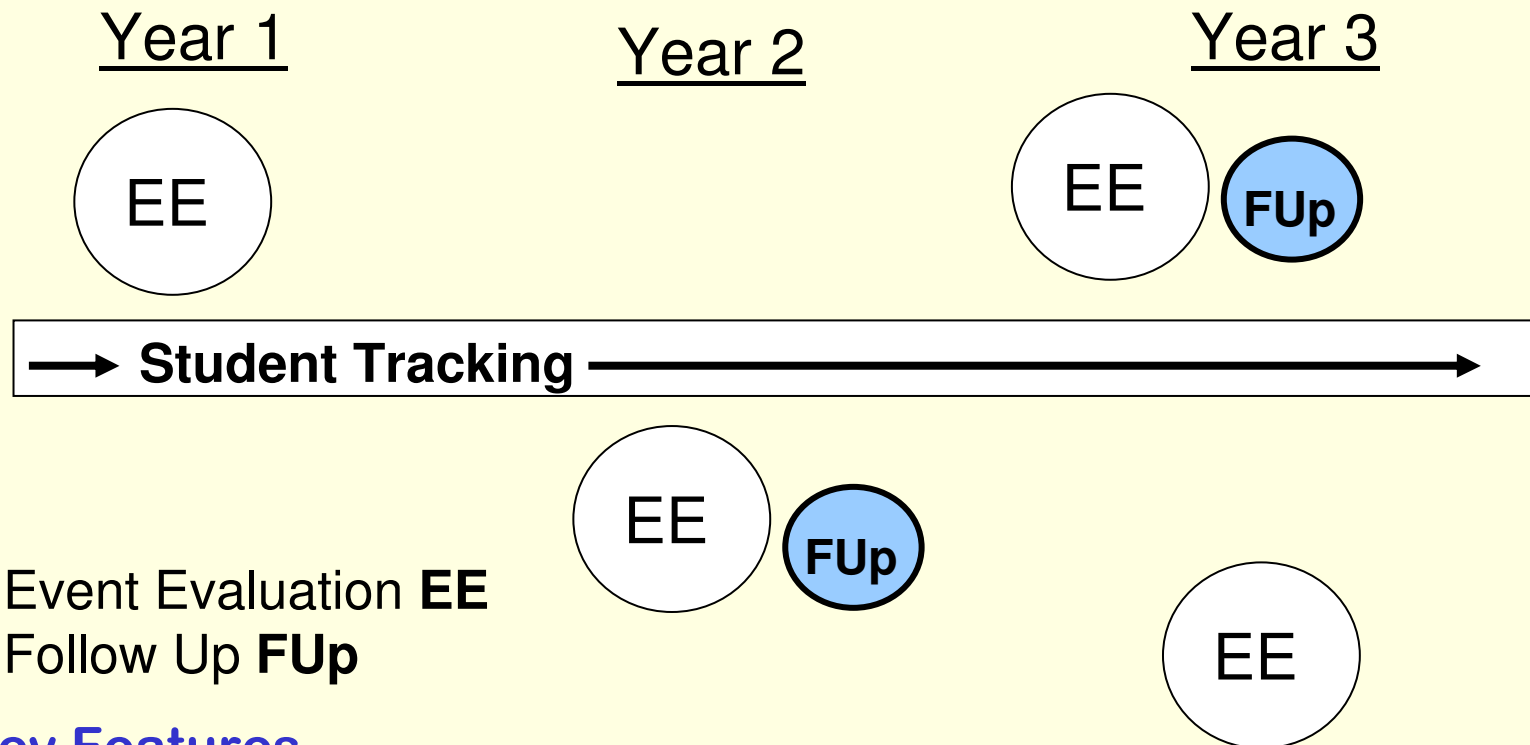
Event Evaluation **EE**



Key Features

- A variety of individual ‘event’ evaluations of WP ‘Events’.
- Mainly recording ‘Level 1 Information’
- Diagram adapted and developed from workshop discussions with Coventry Warwickshire Aimhigher

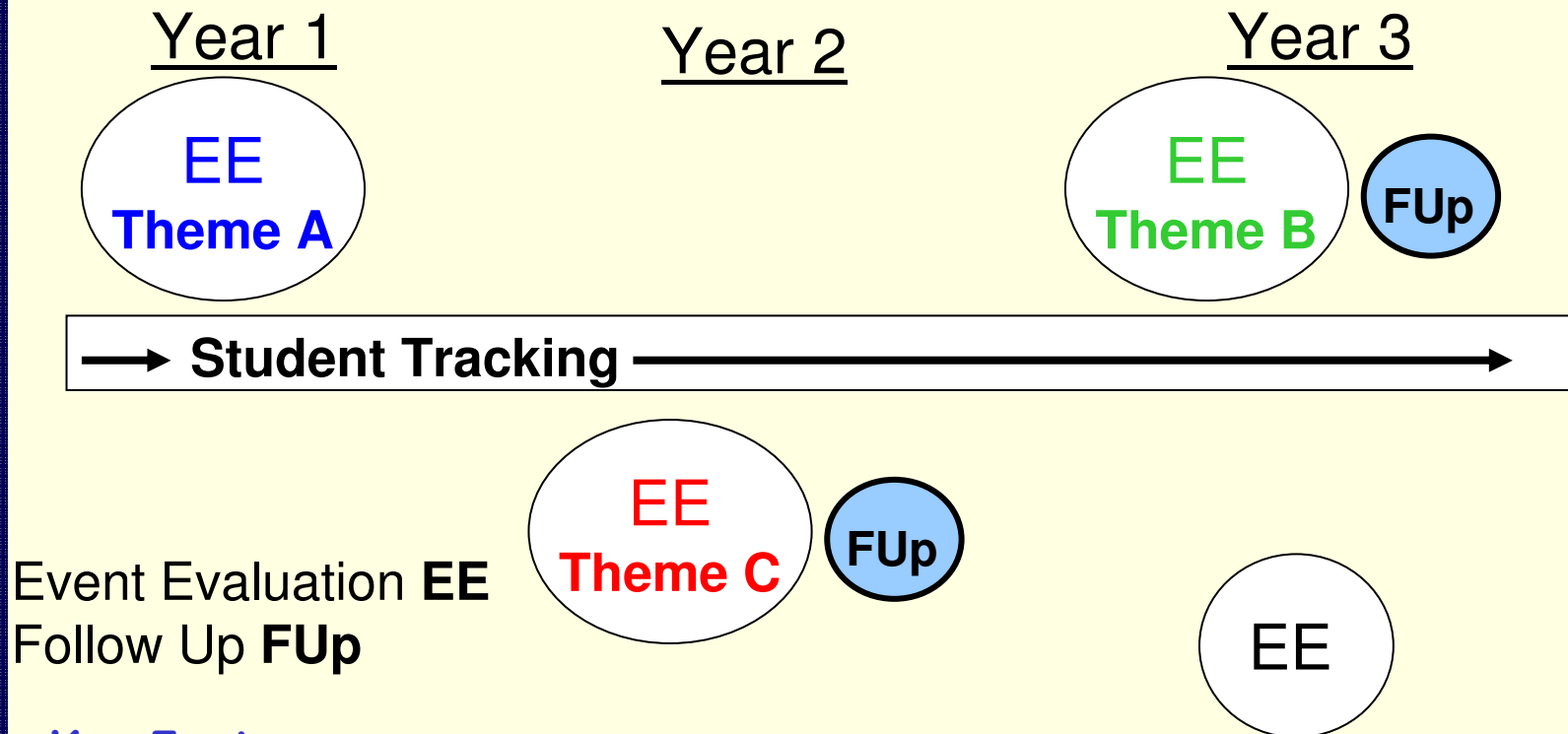
Evaluation Plan – version 2



Key Features

- A variety of individual ‘event’ evaluations of WP ‘Events’ to record Level 1 information plus follow up studies to collect Level 3
- A system of student tracking over several years
- Diagram adapted and developed from workshop discussions with Coventry/Warwickshire Aimhigher

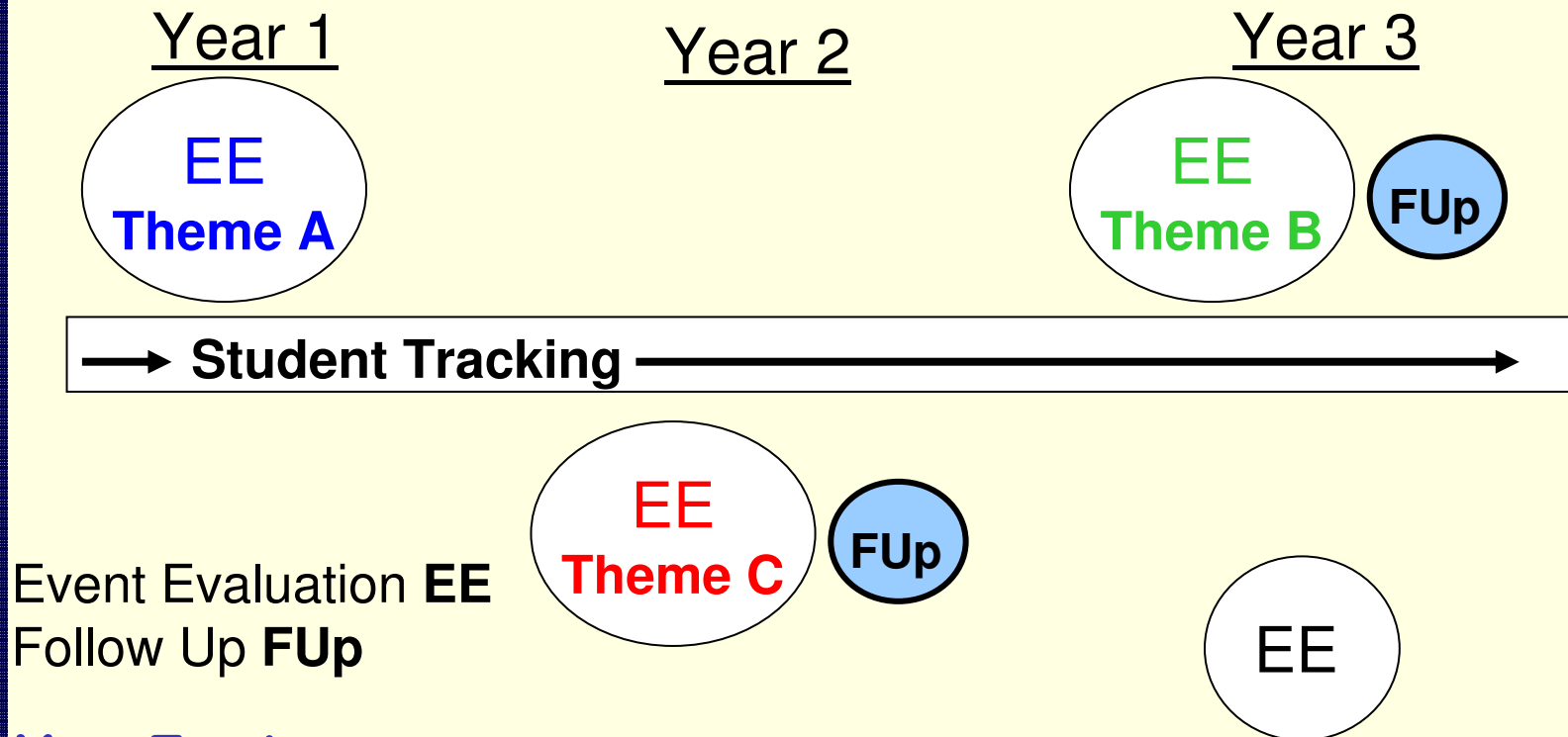
Evaluation Plan – version 3a



Key Features

- A coherent programme of ‘event’ evaluations of WP ‘Events’ to record Level 1 information + follow up studies to collect Level 3. Themes based on structure of WP ‘Menu’.
- A system of student tracking over several years
- Diagram adapted & developed from workshop discussions with Coventry/Warwickshire Aimhigher, Themes Salford University

Evaluation Plan – version 3b



Key Features

- A variety of individual 'event' evaluations of WP 'Events' to record Level 1 information plus follow up studies to collect Level 3. Themes based on the notion of 'Risk Banding' events within the WP 'Menu' e.g. 'Routine', 'Innovative', etc.
- See also Key features version 3a



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Overview of 'evaluation planning'

	Version 1	Version 2	Version 3a	Version 3b
EE - Event Evaluation Level 1	✓	✓	✓	✓
Student Tracking		✓	✓	✓
EE + FUp - Follow up level 3 studies		✓	✓	✓
EE + FUp – Themed focus			✓	✓
EE + FUp – Themed focus and risk banding				✓

Overcoming Constraints

Reflecting on your context

- Which constraints are most problematic for your context?
- How will you seek to overcome the constraints in your context?
- Have you got all the key players around the table?

HEFCE Expectations para 15

Evaluation plan outline how to capture and analyse:

- Perceptions of learners, teachers, parents and others
- Effects on aspiration
- Impact on future engagement in learning
- Learner achievements
- Learner progression

Core Participant Data

- Name
- Dob (dd/mm/yyyy)
- Gender
- Ethnicity
- Disability
- Postcode
- Occupational Background
- Parent / Carer experience of HE
- School / Training Provider

See **6D**

Evaluation Practicalities
for further information on:

- Data Sharing
- Date Storage

Categories of activity

Collect 'core participant data' on:

➤ Category 1

- All participants for between 10% and 30% of your large group / short duration activity

➤ Category 2

- All participants for between 50% and 60% of your high intensity activity (linked series of events over time, smaller numbers involved)

Activities identified by HEFCE

Intensity will depend on mode of delivery

Probable low intensity

- Aimhigher campus visits (generic)
- HE student ambassadors in school and college lessons and IAG events
- School based interventions as part of a programme agreed with schools

Probable high intensity

- Mentoring (face to face or electronic)
- Subject enrichment, master classes or revision sessions
- Summer schools and other HE related residential experiences

Levels of experience

Experience 1

- Confined to Category 1 activity (low / short duration)
- No more than one category 2 activity

Experience 2

- Includes Category 1 activity (low / short duration)
- Minimum of three category 2 activities over two to three years
- Not necessarily consecutively

Activity Categories and Levels of Experience

	Category 1	Category 2
Experience 1	Confined to category 1 activities	Only one category 2 activities
Experience 2	can include some category 1 activities	Minimum of 3 category 2 activities
Core Participant Data (CPD)	All participants for 10% to 20% of category 1 activities	All participants for 30% to 50% of category 2 activities



Evaluation Capacity Building in Widening Participation Practice



County South, Lancaster University, Bailrigg, Lancaster LA1 4YD, United Kingdom
Tel: +44 (0) 1524 592907 Fax: +44 (0) 1524 592914 [E-mail enquiries](#)

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HEFCE Evaluation Capacity Building in Widening Participation Practice

HEFCE have commissioned CSET and REAP (Researching Equity Access and Participation) in the Department of Educational Research at Lancaster University to undertake evaluation capacity building in widening participation. For further information about HEFCE's guidance on widening participation see <http://www.hefce.ac.uk/widen/research/capacity/>.

Following a successful pilot project in Summer 2007, the CSET/REAP team have been delivering a programme of capacity building workshops, eight targeted consultancies and production of a resource toolkit to support evaluation planning and development. More information can be seen as follows:



Events

There are no events today, the next event will be:

12 June 2008, [Evaluation Capacity Building Workshop - Derby](#)

Resource Toolkit

Find out more about our [resource toolkit](#).

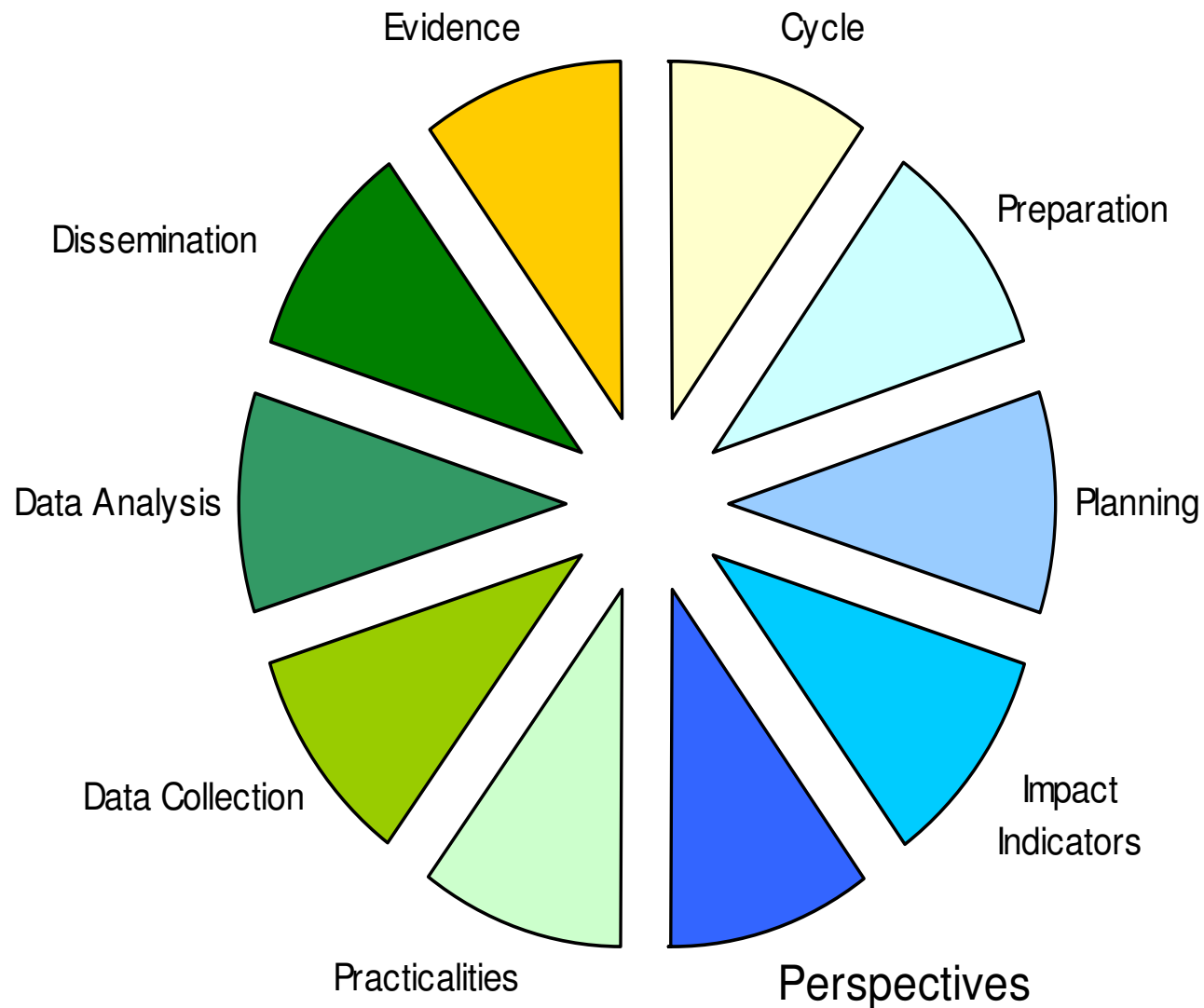
CSET is a specialist research and evaluation centre within Lancaster University's Department of Educational Research. CSET specialises in the fields of education and training and has considerable experience in working in schools, higher and further education. [More>](#)



REAP is a research group within the Department of Educational Research which has particular expertise of the widening participation agenda. [More>](#)

ECB Toolkit

Evaluation Capacity Building in Widening Participation Practice





Workshop

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Toolkit

10 features

- 1 Cycle
- 2 Preparation
- 3 Planning
- 4 Impact Indicators
- 5 Perspectives
- 6 Practicalities
- 7 Data Collection
- 8 Data Analysis
- 9 Data Dissemination
- 10 Evidence

Evaluation Capacity Building
in Widening Participation Practice

5 types of information


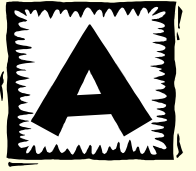
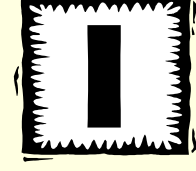


- To do list
- Activities
- Information
- Presentations
- Websites

Website

- Stand alone resources
- Aim to include copy of plans
- Way to disseminate your evaluation

Types of information

Evaluation Capacity Building
in Widening Participation Practice

	<p>In each section of the 'toolkit' there will be a list of steps to take in order to produce your evaluation plan.</p>
	<p>These will provide instructions or templates for conducting an individual or group activity.</p>
	<p>These will provide additional information or refer to other resources that are available on the specific topic</p>
	<p>This will include ppt slides summarising key points on topic for use within institutions.</p>
	<p>These will include pdf documents with details of external websites on the topic</p>



To Do:

Things to do

Evaluation Capacity Building
in Widening Participation Practice

- Read and discuss the HEFCE guidance <http://www.hefce.ac.uk/widen/research/capacity/>
- Identify who is going to follow up any points for clarification in the HEFCE Guidance
- See presentation **1A** for a summary of HEFCE Evaluation Guidance based on the February 2008 HEFCE 2008/05 guidance and April 2008 guidance sent to Aimhigher Partnerships outlining details of data
- Ensure at least one member of the team has explored the different evaluation cycles and is able to recommend an approach for the team to use.
- Plan in some meetings for when you will meet to review the progress made at each stage of your chosen evaluation cycle.
- See also Evaluation Planning and Timing within the RUFDATA framework **3A 3B 3C**



To Do:

Things to do

Evaluation Capacity Building
in Widening Participation Practice

- Review the material relating to Enabling, Process and Outcomes EPO indicators available in presentation 4B
- **NB** Try and think about how you will collect evidence of different indicators, and to recognise that the level of the evaluation will influence what evidence you will obtain and how it might be used.
- As the quantitative measures and outputs are often those more readily captured identify those first and think about how you will report these with respect to the 'core participant data' you are collecting (see discussion about evaluation practicalities 6)
- Having identified the outcomes, try to generate some possible enabling and process indicators. You might generate these based on your own knowledge, or ideas arising from other people's reports. ...
- For examples of EPO indicators that emerged during evaluation of an Aimhigher Summer School see 4A



Presentation

Evaluation Capacity Building
in Widening Participation Practice

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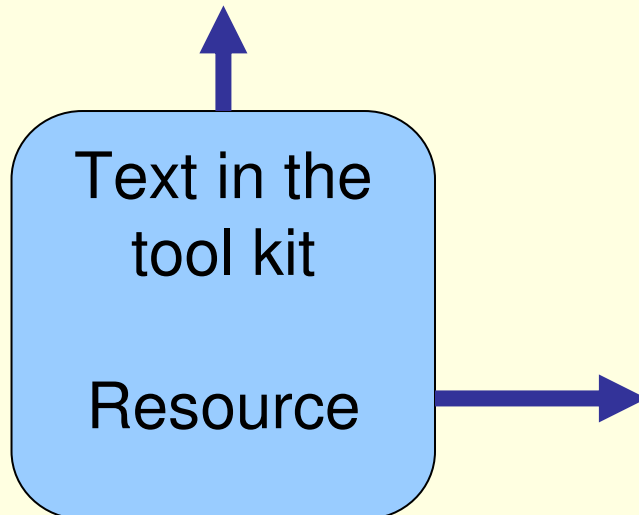
Evaluation
Planning

Toolkit



Evaluation Preparation: Mapping Activities an Overview 2C

This ppt includes examples of the different types of mapping used in the consultancy case studies, one or more of which might be a useful approach for recording and summarising your existing data.



LANCASTER UNIVERSITY

1A

P

Summary of HEFCE Guidance

DRAFT

HEFCE 2008/05

Annex D: Additional guidance on evaluation

HEFCE April 2008

Annex A: Further guidance on evaluation planning

<http://www.lancs.ac.uk/fass/events/capacitybuilding/index.php>

CSET

REAP
Researching Equity
Access & Participation



Evaluation Capacity Building in Widening Participation Practice



ECB Toolkit Website:

www.lancs.ac.uk/fass/events/capacitybuilding/index.php

The Team:

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