**EDLD 8200**

**Assessment and Evaluation in Learning Organizations**

**Spring 2024**

**All classes will be online**

**Dr. Jason C. Bryant**

1463 Haley Center

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**Office Hours:**

By Appointment – call, text, or email to set up an appointment

**EFLT**

College of Education

**Assessment and Evaluation in Learning Organizations**

**EDLD 8200**

Auburn University - College of Education

Educational Foundations, Leadership, and Technology Department

Spring 2024

**Class Information**

**Class Time:** 9 am – 5 pm on the following dates: 1/20, 2/17, and 3/16\*

\*I have a conflict, please hold 4/6 as our third zoom class session.

**Location:** ZOOM

**Instructor:** Dr. Jason C. Bryant

1463 Haley Center

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 Office Hours**:** by appointment

**Course Number**: EDLD 8200

**Course Title**: Assessment and Evaluation in Learning Organizations

**Credit Hours**: 3 semester hours

**Syllabus Revised**: November 2023

**Texts**:

Russ-Eft, D. & Preskill, H. (2009). Evaluation in organizations: A systematic approach to enhancing learning, performance, and change. New York: Basic Books.

W. K. Kellogg Foundation Handbook. <http://www.wkkf.org/Pubs/Tools/Evaluation/Pub770.pdf> (found in Canvas)

Canvas materials, handouts, class activities, and other supplementary reading citations/materials provided via the course Canvas site.

**Course Description:**

This is an introductory course that offers an overview of program evaluation. The course will provide students with the background and experience in designing a program evaluation. Students will learn the historical, theoretical, and practical issues related to program evaluation and will learn to plan, implement, and communicate the results of a program evaluation.

**Course Objectives:**

Upon completion of this course, students will be able to:

* Describe how organizations are changing and what that means for assessment and evaluation practices
* Apply a systems approach to assessing school culture and programs
* Discuss what it means to learn at the individual, team, and organizational level
* Describe the multiple roles that leaders play within learning organizations and their responsibilities related to program evaluation
* Describe the purposes of and differences between standardized assessments and “authentic” assessments
* Analyze a variety of types of data useful for school decision-making
* Apply needs assessment and gap analysis strategies in a situation to identify areas for improvement in teaching/learning processes
* Apply learning processes that facilitate evaluative inquiry
* Understand the key concepts and definitions related to program evaluation, including:
	+ evolution of program evaluation
	+ differences between research and evaluation
	+ purposes of evaluation
	+ The American Evaluation Association Guiding Principles for Evaluation
* Develop the key components of an evaluation plan, including:
	+ Rationale
	+ Purpose
	+ Key questions
	+ Evaluation design
* Understand core issues, including:
	+ the role of stakeholders
	+ the driving political and ethical issues
	+ the impediments and facilitators of program evaluation
	+ the role of program evaluation in building organizational learning capacity

**Course Requirements/Assignments**

**Evaluation Plan (Part I – VII – see below)**

This cumulative assignment asks you to develop, in multiple stages, the core dimensions of a standard program evaluation plan for a program, activity, process, or other *evaluand* in your own or another organization. I have divided this evaluation plan into several segments, so that you can prepare each section as the course progresses and build on your developing understanding of evaluation work. You will receive detailed feedback from me for each assignment. For your final assignment, you will submit a full evaluation plan that incorporates all the individual elements that you will have worked on over the course of the semester.

Please note: in order to unpack the assignment and focus more deeply on certain critical aspects of the evaluation development, the assignments will not fully parallel the organization of the final plan you submit. The recommended order for the final plan is found in Part VII.

**Part I**: Identification of the Evaluand –

What do you want to know about in your own or another organization? In this first assignment, describe the evaluand you intend to evaluate. Please answer the following questions, in detail:

1. What is the evaluand?
2. What do you want to know – i.e., what is the *purpose* of the proposed evaluation?
3. What are your proposed evaluation questions?
4. Why do you want to know about it – i.e., what is your *intended use?*
5. Why do these questions and issues matter?
6. What are the anticipated challenges?
7. Is this a feasible evaluation? Why or why not?
8. Are there any important timing issues to consider?
9. What is your role in the organization?

**Part II**: Evaluation Logic Model –

On what assumptions does your evaluand work? In other words, what is the underlying theory that explains what resources and activities yield which outcomes or accomplishments? For this assignment, construct a table that addresses the following components:

1. Core assumptions about the program
2. Resources required to support program goals
3. Activities implemented to support program goals
4. Outputs
5. Short-term outcomes
6. Long-term outcomes

In addition, prepare a one-page model that illustrates the logic model of your program. Be creative!

**Part III**: Organizational Description –

This document provides critical information about the organization’s history, context, and readiness for evaluation. Please include the following sections:

1. Organizational background (context and brief history)
2. Evaluand description (what, why, why now, etc.)
3. Stakeholders (please use table to indicate stakeholder/group, stakeholder level, core interests and questions, readiness, and political and ethical considerations)
4. Evaluation purpose
5. Evaluation questions
6. Intended use of findings
7. Anticipated challenges or considerations
8. Assessment of organizational readiness for evaluation

**Part IV**: Evaluation Design –

This document provides proposed information related to the design of your evaluand. Please include the following information and provide sufficient detail to support your design.

1. Purpose statement
2. Evaluation questions
3. Role of the evaluator
4. How will this evaluation be undertaken using an *organizational learning approach* that engages stakeholders and builds organizational capacity?
5. Evaluation team
6. Evaluation design (organize by question in a table format):
	1. Question
	2. Source(s) of information
	3. Data collection methods
	4. Sample
7. Rationale for selected evaluation design
8. Limitations of design

**Part V**: Survey or Interview Protocols –

This is the survey or interview protocol you would use to collect data to address your evaluation question(s) *if* you were conducting your evaluation. *Please note*: I do *not* expect you to collect data and do a formal analysis. I will, however, expect you to pilot the survey to a small group.

**Part VI**: Data Analysis Plan –

Expanding the table you used previously in Part Four (evaluation design), add a section that describes how you will analyze and interpret the qualitative and/or quantitative data your evaluation proposes to collect.

**Peer Review:** Near-Final Evaluation Plan –

Post your near final Evaluation Plan for peer review, review two peers’ plans, and then use your peers’ feedback to improve your final plan. Details related to the peer review process will be posted on Canvas.

**Part VII**: Final Evaluation Plan –

The final plan will incorporate all the sections previously described *as well as* a preliminary proposed evaluation budget and a reporting and implementation plan (both of which we will work on in class this semester).

Format of your Final Evaluation Plan:

Title Page

Executive Summary

Logic Model

Evaluand Description Overview

* Organizational Background
* Evaluand Description
* Evaluation Team
* Evaluation Questions
* Design Description
	+ Include each survey/interview question
		- Sources of Information
		- Data Collection Method
		- Sample
		- Data Analysis
* Pilot Study Findings
* Timeline/Implementation
* Reporting Plan
* Preliminary Budget

**Grading**

|  |  |  |
| --- | --- | --- |
| **Assignment** | **Points Possible**  | **Due Date (by 11:59 PM)** |
| Discussion Board Postings | 10 | ongoing |
| Part I: Identification of Evaluand | 10 | January 22 |
| Part II: Evaluation Logic Model | 10 | February 12 |
| Part III: Organizational Description | 10 | February 19 |
| Part IV: Evaluation Design | 10 | March 4 |
| Part V: Survey/Interview Protocol | 10 | March 18 |
| Part VI: Data Analysis Plan | 10 | April 1 |
| Peer Review | 10 | April 22 |
| Part VII: Final Evaluation Plan | 20 | April 29\* |
| **TOTAL POINTS** | **100** |  |

\*If additional time is needed, you may submit your final evaluation plan by May 3.

Grading Scale:

A = 90-100

B = 80-89

C = 70-79

D = 69-60

F = Below 60 Points

Course Content/Calendar:

Please be sure to review the calendar each week to be sure you are meeting the various deadlines. If you are unable to submit an assignment by the due date, please contact me as soon as possible!

|  |  |
| --- | --- |
| **Week** | **Major Topics/Assignments** |
| Week 1Jan 14 – Jan 20 | Reading:*Russ-Eft & Preskill –* Chapters 1-3Assignment due January 22 by 11:59 pmDiscussion Post #1 |
| **Session #1****Saturday, January 20****(ZOOM)****9 am – 5 pm** | Class Activities:* Syllabus
* Why is evaluation needed?
* Key concepts and definitions related to program evaluation
* Multiple roles leaders play within learning organizations and their responsibilities related to program evaluation
 |
| Week 2Jan 21 – Jan 27 | Reading:*Kellogg Foundation Handbook* – Chapter 4Assignment due January 29 by 11:59 pmPart I: Identification of the Evaluand |
| Week 3Jan 28 – Feb 3 | Reading:*Russ-Eft & Preskill –* Chapters 5-6Assignment due February 5 by 11:59 pmDiscussion Post#2 |
| Week 4Feb 4 – Feb 10 | Reading: *Russ-Eft & Preskill –* Chapters 4, 17 and Appendix AAssignment due February 12 by 11:59 pmPart II: Logic Model |
| Week 5Feb 11 – Feb 17 | Reading:*Russ-Eft & Preskill –* Chapters 7, 9, and 10Assignment due February 19 by 11:59 pmPart III: Organizational Description |
| **Session #2****Sunday, February 17****(ZOOM)****9 am – 5 pm** | Topics for Class Discussion:* Key components of evaluation plans
* Types of assessments and the purpose for evaluation
* School culture and program evaluation needs
* Needs assessment and gap analysis
* Guest speaker – Dr. David Marshall, Auburn University
* Please read book chapter provided in Canvas; Schwandt, Chapter 6
 |
| Week 6Feb 18 – Feb 24 | Reading:*Russ-Eft & Preskill –* Chapter 11Assignment due February 26 by 11:59 pmDiscussion Post #3 |
| Week 7Feb 25 – Mar 2 | Reading:*Russ-Eft & Preskill –* Chapter 12Assignment due March 4 by 11:59 pmPart IV: Evaluation Design |
| Week 8Mar 3 – Mar 9 | **Spring Break**Assignment due March 11 by 11:59 pmNone |
| Week 9Mar 10 – Mar 16 | Reading:*Russ-Eft & Preskill –* Chapters 13-14Assignment due March 18 by 11:59 pmPart V: Survey or Interview Protocols |
| **Session #3****Saturday,** **March 16\*****(ZOOM)****9 am – 5 pm** | Topics for Class Discussion:* Review core issues in program evaluation
* Learning at the individual, team, and organizational level
* Pulling your evaluation plan together

This session could be moved to April 6! |
| Week 10Mar 17 – Mar 23 | Reading:*Russ-Eft & Preskill –* Chapter 15Assignment due March 25 by 11:59 pmDiscussion Post - #4 |
| Week 11Mar 24 – Mar 30 | Reading:NoneAssignment due April 1 by 11:59 pmPart VI: Data Analysis Plan |
| Week 12Mar 31 – Apr 6 | Reading:*Russ-Eft & Preskill –* Chapter 16Assignment due April 8 by 11:59 pmPreparing Near-Final Evaluation Plan for Peer Review (nothing posted to grade unless you want to begin receiving feedback from peers) |
| Week 13Apr 7 – Apr 13 | Reading: *None*Assignment due April 15 by 11:59 pmPost Near-Final Evaluation Plan for Peer ReviewThis will count as Discussion Post #5 |
| Week 14Apr 14 – Apr 20 | Reading:NoneAssignment due April 22 by 11:59 pmComplete Peer Review |
| Week 15Apr 21 – Apr 27 | Reading:NoneAssignment due April 29 by 11:59 pm Part VII: Final Evaluation Plan (this can be extended to May 3, if additional time is needed) |

**Class Policy Statements:**

A. Class Attendance/Absences: This course will meet over three (3) weekends and your presences is required. Students are expected to engage in the learning material and be an active presence during class. Students must meet the assignment deadlines described in the syllabus.

B. Excused absences: Students are granted excused absences. Late assignment submission may be excused for the following reasons: illness of the student or serious illness of a member of the student’s immediate family, the death of a member of the student’s immediate family, trips for student organizations sponsored by an academic unit, trips for university classes, trips for participation in intercollegiate athletic events, subpoena for a court appearance, and religious holidays. Students who wish to have an excused absence (submit late work) for any other reason must contact the instructor in advance of the absence to request permission. The instructor will weigh the merits of the request and render a decision. When feasible, the student must notify the instructor prior to the occurrence of any excused absences, but in no case shall such notification occur more than one week after the absence. Appropriate documentation for all excused absences is required. Please see the *Tiger Cub* for more information on excused absences (<http://education.auburn.edu//files/file1610.pdf> ).

D. Late work: Work for this class should be turned in on time. Without prior permission from the instructor to turn an assignment in late and/or a university approved excuse, no credit will be given for late work. Because the major assignments for this course build to your final project, it is important that you turn work in on time so that feedback may to given, but if you see that you will miss a submission deadline, please email me in advance!

E. Disability Accommodations: Students who need accommodation are asked to electronically submit their approved accommodations through AU Access and the Office of Accessibility. Once the instructor is notified, it is the responsibility of the STUDENT to arrange a meeting during office hours the first week of classes, or as soon as possible if accommodation is needed immediately. To set up this meeting, please contact me by e-mail. If you have not established accommodation through the Office of Accessibility, but need accommodations, make an appointment with the Office of Accessibility, 1228 Haley Center, 844-2096 (V/TT). Please visit their web site at: http://accessibility.auburn.edu/

F. Honesty Code: All portions of the Auburn University Honesty Code and the Tiger Cub Rules and Regulations pertaining to Cheating will apply to this class. I will report all academic honesty violations or alleged violations to the Office of the Provost, which will then refer the case to the Academic Honesty Committee. *Please note that copying and/or pasting other individuals’ work and then presenting it as your own (intentional or unintentional) is considered plagiarism and is in direct violation of the Honesty Code. Violations of the Honesty Code may result in a zero for the assignment, a failing grade for the course, suspension and/or expulsion from the university.*

G. Email: Auburn University has provided each student with an email account and should be used appropriately as the official and professional communication medium between the University and the student. For this reason, students should communicate with the instructor using only their University account as Email originating from Hotmail, AOL, Gmail or other non-Auburn sources may not be opened by the instructor and are not official communications.

*Please note: I expect you to produce original work for this class. You may not submit work for this class that you have previously completed for a different class. If you have any questions, please see me prior to submitting your assignment. You may receive a zero for work that is reflective of another course’s work – even if it is your own work.*

Please see <http://www.auburn.edu/academic/provost/story.html?1149111436000133> and <http://www.auburn.edu/tigercub/handbook.html> for additional information for which you are responsible.

G. Professionalism: As faculty, staff and students interact in professional settings; they are expected to demonstrate professional behaviors as defined in the College’s conceptual framework. These professional commitments or dispositions are listed below:

* Engage in responsible and ethical professional practices
* Contribute to collaborative learning communities
* Demonstrate a commitment to diversity
* Model and nurture intellectual vitality

**Evaluation References and Resources**

Brinkerhoff, R.O. (2003). The success case method: Find out quickly what’s working and what’s not*.* San Francisco: Berrett-Koehler.

Bouchard, T.J. (1976) Unobtrusive measures: An inventory of uses. Sociological Methods and Research, 4, 267-300.

Dillman, D.A. (1999). Mail and internet surveys: The tailored design method (2nd edition). New York: John Wiley & Sons.

Fink, A. (1995). How to ask survey questions. Thousand Oaks, CA: Sage.

Fink, A. (1995). The survey handbook. Thousand Oaks, CA: Sage.

Fink, A. (2003). The survey kit (2nd edition). Thousand Oaks, CA: Sage.

Fitzpatrick, J.L., Sanders, J.R., & Worthen, B.R. (2004). Program evaluation: Alternative approaches and practical guidelines (Third ed.). Boston: Pearson.

Herman, J.L. (Ed.). (1987). Program evaluation kit (Second ed.). Newbury Park, CA: Sage Publications.

Jaeger, R. M. (Ed.). (1992). The program evaluation guides for schools. Newbury Park, CA: Sage/Corwin Press.

Jason, M.H. (2003). Evaluating programs to increase student achievement. Glenview, IL: Skylight Professional Development.

Newman, D. L., & Brown, R. D. (1996). Applied ethics for program evaluation. Thousand Oaks, CA: Sage.

Patton, M.Q. (2001). Qualitative research and evaluation methods (3rd edition). Thousand Oaks, CA: Sage

Patton, M. Q. (1997). Utilization-focused evaluation: The new century text (3rd ed.). Thousand Oaks, CA: Sage.

Preskill, H. & Torres, R.T. (1999). Evaluative inquiry for learning in organizations. Thousand Oaks, CA: Sage publications.

Rossi, P.H., Freeman, H.E., & Lipsey, M.W. (2003). *Evaluation: A systematic approach* (7th edition). Thousand Oaks, CA: Sage.

Sanders, J.R. & Sullins, C.D. (2006). Evaluating school programs: An educator’s guide (Third ed.). Thousand Oaks, CA: Corwin Press.

Shadish, W. R., Jr., Cook, T. D., & Leviton, L. C. (1991). Foundations of program evaluation: Theories of practice. Newbury Park, CA: Sage Publications.

Stufflebeam, D.L. (2001). Evaluation models: New directions for evaluation, No. 89. San Francisco: Jossey Bass.

Torres, R.T., Preskill, H. & Piontek, M. (2005). Evaluation strategies for communicating and reporting: Enhancing learning in organizations (2nd edition). Thousand Oaks, CA: Sage.

Weiss, C.H. (1998). Evaluation: Methods for studying programs and policies (Second ed.). Upper Saddle River, NJ: Prentice Hall.

**Online Resources**

American Evaluation Association: <http://www.eval.org>

*American Evaluation Association Guiding Principles for Evaluators*. (Available at <http://www.eval.org>).

American Institutes for Research for US Department of Education. Educator’s guide to evaluating the Use of Technology in Schools and Classrooms. <http://www.ed.gov/pubs/EdTechGuide/>. Washington, DC: author.

*American Journal of Evaluation* (Available at <http://www.eval.org>)

Evaluation Center at Western Michigan University. <http://www.wmich.edu/evalctr>.

Learning Technology Dissemination Initiative, Heriot Watt University (199). Evaluation Cookbook. <http://www.icbl.hw.ac.uk/ltdi/cookbook/contents.html>. Edinburgh, Scotland: author.

*New Directions for Evaluation* (Available at <http://www.eval.org>)

W.K. Kellogg Foundation (October, 2000). Logic Model Development Guide. Battle Creek, MI. <http://www.wkkf.org>.