

# MAKE A PATH *for* EVALUATION

## 10 STEPPING STONES HELP LEADERS BUILD SOLID PRACTICES

By Robby Champion

**Y**ou may have noticed a near absence of conversation about thorough evaluation of professional learning. Perhaps this topic has momentarily slipped off everyone's agendas — too many other high-priority challenges.

Maybe the silence correlates with the decline in federal grants requiring systematic monitoring and some degree of program evaluation to document evidence of results. Or, most likely, a confluence of factors pushed program evaluation aside.

One thing is for sure. If professional learning leaders are looking for a clear path lined with models of best program evaluation practices, they will become tangled in the weeds.

I encourage leaders to get started making their own path. As it happens, there are lots of reasonable places from which to start.

Since the knowledge base about evaluation of professional learning expanded noticeably in the 1990s, the pressure for doing better program evaluation will not likely disappear. Why? As in other education endeavors, leaders are now re-

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responsible for getting the best possible results.

The benchmark has been reset. Professional learning leaders will be expected to ensure that the connections between their work and enhanced student learning are not just happenstance. Just as they are breaking through new paths to expand the available learning models and options for adult learners, these leaders will be expected to have the knowledge, will, and expertise to undertake better evaluation practices than were accepted in bygone eras.

After working for several decades to help professional learning leaders and their teams improve programs and evaluations, I have observed several habits of mind and work that can make a significant difference in the quality of evaluations. I offer these 10 stepping stones for leaders growing curious or anxious about undertaking solid evaluation practices.

## **1 CARVE OUT 10% OF YOUR WORK TIME.**

Your challenge is to make program evaluation in your organization better than last year — not perfect, but better. How do you accomplish this? Don't wait until a program is well underway or winding down to figure out what needs to be done regarding evaluation. Incorporate evaluation into your work calendar on a regular basis.

Devoting 10% of your time to professional learning evaluation tasks can achieve more than you think, especially if you drop the habit of multitasking and focus on this one task. You may pride yourself on multitasking, but this work calls for monotasking.

When a task is not routine yet and you are learning as

you go, you need to focus on it. You will get a lot done if you focus. You may fumble around. You will rethink more efficient ways of doing it. You will make corrections as you go and as you gain input from others. All of that is essential to gaining traction on your new path.

Before planning any organized professional learning, before initiation and implementation get rolling, start a new habit of mind: Make evaluation part of the program's life story from conception.

I call this level 0 evaluation. It accomplishes two things: It works out any bugs and builds support among stakeholders (Champion, 2004). With this newly acquired habit of mind, you have a better chance of ensuring that a program is appropriate, has the best design you can afford, and has the best possible chances of enhancing student learning in this context.

## **2 START AN INFORMAL COLLABORATIVE LEARNING GROUP.**

Many educators in charge of programs, initiatives, or grants have never taken a course in program evaluation. Take the lead: Start a learning group to expand your knowledge, and invite your collaborators to learn along with you.

Maybe your situation calls for a monthly 30-minute brown bag lunch group or 15 minutes carved out of a regular weekly staff meeting or 90 minutes out of a semi-annual retreat. Or maybe you need to launch an online study group on this topic so your colleagues can participate at their convenience.

For reading materials, expect to dig around. Not many program evaluation reports get published in journals. Many published reports are snoozers — weak evaluation designs, heavy with jargon and rambling narratives, guilty of overreach with too much weight placed on sketchy self-report data. Select a few articles, brief abstracts, blurbs in journals, or even a book.

You can read and dissect the readings together or have participating members each read something different on their own and report back their discoveries to the group. Learn from both the good and the mediocre examples — much like facilitators learn from the good and the poor facilitators they encounter.

If you look outside the field of education, you will find worthwhile reading materials. Search for evaluations of professional development or training conducted by corporations or in medical fields, such as nursing education journals or government-funded studies.

Locate a variety of types of studies, including self-report surveys, in-depth case studies, longitudinal studies, experimental control group studies, ethnographic investigations, and studies examining return on investment. Look for goal-based versus non-goal-based program evaluations.

Note especially any reports of evaluation efforts that combine methodologies in order to gain deeper insights from various kinds of data. Pay attention to particular aspects that puzzle you: major question(s), program description, design type, participant sample and the technique used to select the sample, data sources, procedures used to collect data, data analysis and treatment, how data are triangulated, the findings, and next steps.

### 3 GET OUT OF THE “BROAD GOALS” TRAP.

Evaluation becomes convoluted when programs are aimed loosely at broad goals. Take this typical dilemma: Reading scores in a school or district improve significantly. What really pushed the reading scores up?

Think of all of the possible influences or drivers. Was it the new language arts and literacy curricula, the addition of trained reading mentors who worked side-by-side with new teachers drilling down on specific reading habits every day, the increase in instructional time devoted to reading, the influx of new principals who were trained and charged with pushing reading, whole-school free reading time, or was it the interim testing in classrooms begun last year to keep much closer track of student progress?

Ask five different leaders in a district, school, or state, and they will likely give you five very different explanations for the results, depending on their particular area of expertise and work responsibility.

Before launching any professional learning initiative, clarify the targets you are taking responsibility for that are related to the broad goals you are supporting. Work collaboratively with others to specify measurable results of the professional learning efforts you lead.

This may seem obvious since specific learning outcomes and results have been an established practice for decades. That is the reality in programs for students, but professional learning initiatives are often launched with no more direction than to support broad organizational priorities or goals.

Your challenge as a leader in this next era of professional learning is to work collaboratively with your stakeholders (faculty, departments, teams, district leadership) to align strategically with the enhancements to student learning that are the broad goals and the intended timeline. Break this down into the specific knowledge, skills, attitudes, and practices that participating educators will be employing in their practice at a specific target date.

### 4 USE THE MOST POWERFUL DESIGNS YOU CAN AFFORD, AND START WITH A COST-BENEFIT HABIT OF MIND.

Advisory groups often like to get their work done pronto — without stepping back to pause and methodically consider costs and benefits. Sometimes these groups also become infatuated with particular professional learning models, favorite consultants, and established traditions.

When you undertake to plan any initiative, pause to take a second look with a cost-benefit analysis frame of mind. Your responsibility is to select the most powerful learning models and practices to get the results intended within the resources available.

Envision this typical scenario: Groupthink takes over when the suggestion comes into focus to launch into using mentors for induction of new teachers — like they do in the district down the road. Before the loud affirmations and applause close the work session, lead your group to pause and work through a cost-benefit analysis.

Question the kinds of resources needed to support mentoring, including ongoing training and support for the mentors throughout implementation of the strategy. Question how effective mentoring as an induction approach might be if, due to limited resources, mentors get only 10 hours of training or have to be stretched to limit contact with each new teacher to 90 minutes per week.

Two important axioms to remember: The more powerful the design, the more likely you will get strong results, and every model of learning has its costs and benefits.

### 5 FOCUS ON THE BIG PICTURE WITH A BACKWARD MAP.

If you are working within a multiyear timeline, you need a backward map. This planning strategy requires that you list the target accomplishments you need to see happening for each span of time (such as quarters or semesters), starting with the farthest out date. Be warned: Some of your collaborators may cling to the old habit of “Let’s just see how it goes” rather than thinking of measurable milestones to guide the next few years’

work. Backward mapping is a big picture, results-driven habit of mind.

Backward mapping helps with formative assessment of what is working and what needs to be adjusted right away. It helps remind you and your adult learners and your collaborators of the next milestones. If you use a backward map to guide what data you collect on evaluation questions, you will be ready at a moment's notice to report with confidence to your leadership on the results thus far.

## 6 CHRONICLE EVERY INITIATIVE'S LIFE STORY.

You might have already faced the challenge of taking over a job without the benefit of the history or results data for a program or initiative. Beyond stacks of customer satisfaction surveys (often not tallied, analyzed, summarized, scored, or reported), you might have to make major decisions without sufficient background — no narrative on the program's vision or original mission, no videos or electronic portfolios or photos of student work, no backward map, no interim progress reports, no interviews or focus groups with students or teachers, no graphs of the metrics.

Start the work habit of creating and maintaining an ongoing chronicle for every initiative. Whether you create an electronic portfolio online or use a loose-leaf notebook, the program's story will serve you well. Update it so that the record shows an ongoing story of the initiative, including the rationale or approach to change, contact information for all leaders, samples of the evaluation tools, formative evaluation results, narrative notes on shifts and improvements made to accommodate changes in leadership or funding, budgets, newsletter articles, pictures of students at work in classrooms, evidence of student learning, and a timeline or backward map.

## 7 ESTABLISH EVALUATION PRIORITIES.

A big part of doing a good job with program evaluation is deciding which burning questions to investigate — and which not to investigate. Whittle down the scope of the evaluation work so that it is manageable with the resources you have. Remember: All programs deserve to be evaluated, but not all programs need to be evaluated with the same degree of effort.

You can establish evaluation priorities in several ways. For example: Focus on the program or programs for which the stakes or organizational expectations are highest. Or focus on making one manageable but vital improvement to all of your initiatives at the same time.

Once you have set your evaluation priorities, you can be much more definitive when seeking help and expertise to get the job done. Evaluation of any scope requires resources. There are a variety of jobs to be done, so you can use various kinds of help. Seek out university graduate students, volunteer interns, local university professors, measurement and technology experts within your district, and research institutes in your region.

## 8 CREATE TEACHABLE MOMENTS AND SHARE WHAT YOU KNOW.

One reason that expectations regarding professional learning practices stay decades behind is that some top decision-makers are stuck in a time warp.

They do not have up-to-date information about advances in the field of professional learning. They still envision professional learning as edutainment aimed to inspire and transform — required attendance events for employees who passively face the front of the room, listen attentively, applaud politely, become inspired, complete the exit survey, leave the room, go back and make changes in how they do their jobs, and produce wildly better learning results for students.

Many top leaders are oblivious to the innovative ways in which employees are learning at work today — open source knowledge sharing strategies, 10-minute alerts, online learning aids, informal job-embedded conversations, team huddle techniques, video simulations, collaborative analysis of student work, and more.

Get ready to share what you are learning — in small digestible morsels. Create teachable moments. This is vital if you are to cut a new path and get others to join you on this path.

Be aware that some top-level leaders know even less about program evaluation than they do about the array of emerging models of professional development. Think through what you are learning and what you would say if you get the spotlight for a couple of minutes in a committee meeting.

Be ready to draw a quick sketch of the different levels of program evaluation or the typical performance dip that occurs during change. Be ready to explain how you regularly do various formative assessments to keep track of how, for example, the initiative to develop team leaders or mentors or department chairs is advancing (Champion, 2001).

Be ready to answer questions about your work when the ball is tossed to you. Here is how not to do it: I encountered a top leader in a steering committee meeting who challenged me by asking, "I think principals should be given a test at the end of each summer institute. What proof do you have that they are learning anything?"

I fumbled the ball because I was so stunned with the question. I assumed the leader knew the critical importance of follow-up supports to ensure that whatever was learned in a summer institute was put into practice.

Leaders often find program evaluation perplexing. They wonder what makes evaluation of organized professional learning efforts so challenging. The simple answer: There's a lot going on. Even if your professional learning efforts are considered top-notch, they are not the only influences on student learning.

Another important reality to acknowledge: Educators learn from many sources outside of the workplace — graduate programs, professional organizations, online sources, or even informally chatting with other teachers, and they learn at home.

This mix of learning sources can easily get mingled with and overtake whatever impact the professional learning in your organization achieves. That is not a condemnation of the program but an opportunity to learn.

Program evaluation queries should focus on collecting various data to triangulate when asking questions that matter, such as: “Looking at our interim target, how are we doing thus far, and what is the evidence?” “What do we need to improve right now to increase progress toward our stated long-range targets?” “What did the investment in this effort cost?” “What, if anything, did this program contribute that was not anticipated? What patterns are we seeing repeatedly and what might they tell us?”

## 9 GET OTHER FINGERPRINTS ON THE EVALUATION.

To do solid, credible program evaluation, you need the cooperation and collaborative thinking of other stakeholders. Avoid making all program evaluation decisions on your own, even if it seems more efficient. Just as it is important to involve your adult learners (or their representatives) in helping create a professional learning plan that affects them, reach out to get input about evaluation design decisions. Then be generous with kudos to all those who helped strengthen the evaluation.

Your colleagues all around the organization have expertise, information, documentation, student work samples, videos, and valuable stories to share. You need all of this to make your evaluation efforts credible and valued.

Keep your stakeholders in the loop from start to finish and with regular updates. Resistance to participating in data collection often stems from people sensing they have not been kept informed, listened to, or adequately recognized for their investment of time or ideas.

In addition, disdain for the results that come out of an

evaluation effort often include remarks like these, and they can sink your evaluation report: “This is all news to me.” “No one interviewed any of us.” “No one ever visited classrooms here that I know of.” “I don’t buy the notion that teacher team projects can show real evidence that they actually learned anything new from working together to analyze student work.”

## 10 CREATE DEADLINES ON YOUR EVALUATION WORK CALENDAR.

Steady progress on your evaluation path will be a challenge. You have myriad other tasks that are more pressing. They are also more predictably rewarding. What to do?

Most professional development leaders have a strong habit of mind about working backward from big deadlines and public events. Work with that established habit of mind by creating a firm deadline. Put it on your public calendar. You might even promise to give a report at a particular time and place. Prepare whatever you think will help your stakeholders sit up and take notice of your evaluation efforts — video, snapshots of students in classrooms where the new techniques are being employed, charts displaying the trends in data, and some notable quotes.

Best wishes on your journey.

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**Robby Champion (robbyhchampion@gmail.com) is an author and consultant. ■**

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**Lois Brown Easton (leastoners@aol.com) is a consultant, coach, and author. ■**