EVALUATION: A MEANS TO GAIN INSIGHTS INTO AND IMPROVE THE ROER4D PROJECT

Goodier, S.;

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Evaluation: a means to gain insights into and improve the ROER4D project

Sarah Goodier
ROER4D Evaluation Advisor

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WHAT IS EVALUATION?
Evaluation is...

... the systematic determination of the quality or value of something (Scriven, 1991)

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• It is done according to a specific plan/method, in a thoughtful way
• It measures merit/worth
• It is focused on a specific programme/intervention/technology

The purposes of evaluation

• Assessment of merit or worth
  Are specific standards met?

• Improvement
  What can be improved? And how?

• Oversight and compliance
  Is the technology cost-effective?
Research vs Evaluation

Add knowledge to a specific field

Researcher derives the questions (researcher-focused)

Testing a hypothesis/hypotheses

Who decides what you study?

Funder/programme specifies the questions

Answering evaluation questions

Purpose of the study

Make judgments/decisions in a specific context

Social science methods & analyses

Results

Findings inform recommendations based on evaluation questions

Sharing findings

Research findings (and some explanation)

Publish – share with research community in the field

Evaluation report to stakeholders (may also publish)

Modified from: http://aea365.org/blog/john-lavelle-on-describing-evaluation/
Exercise:

- Come up with an example of 1) Research and 2) Evaluation that show the difference between the two

(See the previous slide)
EVALUATING ROER4D
In what ways, and under what circumstances can the adoption of OER address the increasing demand for accessible, relevant, high-quality and affordable education and what is its impact in the Global South?
ROER4D Objectives

1. Build an empirical knowledge base on the use and impact of OER in education
2. Develop the capacity of OER researchers
3. Build a network of OER scholars
4. Communicate research to inform education policy and practice
5. Curate output as open content
ROER4D Key Evaluation Areas

1. Build an empirical knowledge base on the use and impact of OER in education
2. Develop the capacity of OER researchers
3. Build a network of OER scholars
4. Communicate research to inform education policy and practice
5. Curate output as open content
ROER4D Evaluation and Communication supported by DECI-2

An IDRC funded research project to build and mentor Communication and Evaluation for IDRC flagship projects

http://evaluationandcommunicationinpractice.net/

WHAT WE DO
We provide capacity development in both evaluation and communication for IDRC research projects in the Information & Networks Program (I&N). We provide mentoring in Utilization-

WHO WE ARE
DECI-2 is hosted by the New Economy Development Group, a consulting group in Ottawa, Canada. Dal Brodhead and Ricardo Ramírez are co-leaders, with support from Wendy Quarry (Ottawa).
UTILIZATION FOCUSED EVALUATION (UFE)
What is utilization focused evaluation (UFE)

UFE is centered around intended use by intended users

What do the users (key stakeholders) want to know?

How will answers to the KEQs help to improve the project?

Remember that evaluation is about assessing worth of something
1. Assessing program readiness  
2. Assessing evaluator readiness  
3. Identifying primary intended users  
4. Situational analysis  
5. Identification of primary intended uses  
6. Focusing the evaluation  
7. Evaluation design  
8. Simulation of use  
9. Data collection  
10. Data analysis  
11. Facilitation of use  
12. Meta evaluation

Steps in the Utilization Focused Evaluation (UFE) process
UFE in 12 steps:

1. Assessing program readiness
2. Assessing evaluator readiness
3. Identifying primary intended users
4. Situational analysis
5. Identification of primary intended uses
6. Focusing the evaluation
7. Evaluation design
8. Simulation of use
9. Data collection
10. Data analysis
11. Facilitation of use
12. Meta evaluation

Steps are **iterative**, not linear

Progress towards fine-tuning evaluation
UFE in 12 steps:

1. Assessing program readiness
2. Assessing evaluator readiness
3. Identifying primary intended users
4. Situational analysis
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Progress towards fine-tuning evaluation

Different ROER4D objectives are at different stages in the UFE process.
DEVELOPING AN EVALUATION STRATEGY
ROER4D Process of developing evaluation strategy

1. Understand what is needed in terms of the **scope** of evaluating the ROER4D project – the evaluation work is iterative by nature.

2. In collaboration with the ROER4D network hub team, formulate an **evaluation plan**, including what to evaluate and how.
   
   > The experience of the evaluation process and the effect this has is a key component of the evaluation.

3. Get **feedback** from DECI-2 around the evaluation work and incorporate this into the process.
ROER4D Process of developing evaluation strategy
## ROER4D Process of developing evaluation strategy

### ROER4D Evaluation plan: Measurements and Key Dates

<table>
<thead>
<tr>
<th>Objective</th>
<th>KEQ(s)</th>
<th>To assess: Numbered by relevant KEQ(s)</th>
<th>Evidence</th>
<th>Measurement</th>
<th>What will be tracked/measured</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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**Objective 1:** Improve the way ROER4D is presented in the social media space, refine which social media channels ROER4D should further invest time in developing/be active on; see how well established ROER4D is as a significant OER Research project among global OER networks, organisations and programmes; give an indication of the credibility and receptivity of the project; develop new sections of the website/change what information the website contains; change the website so as to attract more visitors or to see which geographical areas we need to target.

**Objective 2:** Communicate research to inform education policy and practice.

**Objective 3:** To assess the ROER4D communication strategy working.

**Objective 4:** how well is the ROER4D communication strategy working?

**Objective 5:** how has ROER4D's social media presence helped build the project brand?

**Objective 6:** To what extent has the ROER4D project been established as a significant OER research project in a) the Global South b) globally (and how has the social media presence helped with this)?

**Objective 7:** Which of ROER4D's communication channels/approaches has been the most effective for communicating about the project's key objectives?

**Objective 8:** ROER4D's social media presence; 4.12 established as a significant OER research project in a) the Global South b) globally (and how has the social media presence helped with this) 4.13 Which of ROER4D's communication channels/approaches has been the most effective for communicating about the project's key objectives.

**Evidence:**

- Evaluation of our research communication activities, including ROER4D website, blogs, events, Twitter profile, Facebook profile, external publicity: Global or local newsletters, Look at both internal and external.

**Measurement:**

- Monitor social media activity (retweets, shares, etc.) & network growth, impact and uptake.

**TAGS (Twitter Archiving Google Spreadsheet) allows for an archive of all the Tweets containing a specific phrase to be accumulated for analysis.**

- All tweets containing the phrase “ROER4D” were collected from the 11 November 2014 and will continue to be collected.

- Analysis of the TAGS data includes a summary of the top tweeters; a network diagram of replies, mentions and retweets.

**Data from the start of the Twitter account (20 January 2014) - ongoing**

- Twitter tracking activity around “ROER4D” in TAGS.

- Tracking documents also see tracking doc list: [link]
ROER4D Process of developing evaluation strategy

4. **Connect** with members of the ROER4D, where needed (surveys, interviews, etc.)

5. Assess the **findings**

6. **Share products** of the evaluation work (e.g. slides around process and results, reports, etc.) timeously to allow the findings and recommendations to effect change.

7. Be aware of all components of the evaluation work and **collaborate/share** information where possible and where needed.
<table>
<thead>
<tr>
<th>ROER4D Key Evaluation Areas – involving technology use</th>
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</thead>
<tbody>
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Webinars
Social media
UFE in 12 steps:

1. Assessing program readiness
2. Assessing evaluator readiness
3. Identifying primary intended users
4. Situational analysis
5. Identification of primary intended uses
6. Focusing the evaluation
7. Evaluation design
8. Simulation of use
9. Data collection (In progress)
10. Data analysis
11. Facilitation of use
12. Meta evaluation

Progress in the evaluation:

Focus on:
- Data collection and analysis
- Facilitation of use by the ROER4D team
Next steps

- More data collection and analysis (ongoing for webinars, Twitter as well as other social media platforms)
- Feedback from the facilitation of use into refinements in the identification of primary intended uses and users to help focus the evaluation further
- Constant dialogue with the ROER4D team and PIUs
SUMMARY
Evaluation is...

... the systematic determination of the quality or value of something (Scriven, 1991)

- It is done according to a specific plan/method, in a thoughtful way
- It measures merit/worth
- It is focused on a specific programme/intervention/technology

Research and Evaluation are different but share methods

- Prepare an evaluation plan
- Choose what to measure and how (indicators)
- Collect the data (evidence)

Some lessons from evaluating ROER4D

- Find a framework for your evaluation (e.g. UFE)

- For both internal evaluation and external evaluations, never underestimate the importance of iterative engagement – more engagement = better understanding of the project and what matters to the evaluation users

- Keep feeding back from the facilitation of use into refinements in the evaluation to help focus the evaluation further
Further reading:

About ROER4D:


About evaluation:


Links and license

Website: http://roer4d.org

Contact author: Sarah Goodier
sarah.goodier@uct.ac.za
@SarahGoodier

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