

## 2 An Evaluation Checklist

### Introduction and summary

This checklist can be used to evaluate any academic or academic related product, service or venture. It should be used alongside other documents in this evaluation framework.

The clumsy phrase 'product, service or venture being evaluated' will hereafter be replaced with 'evaluand', meaning 'that which is being evaluated'. ('Evaluand' might best be kept as jargon for the evaluator only, and not inflicted on users, although it is a perfectly proper word.)

This checklist addresses (1) specifying and planning the product or service and (2) collecting and using evaluation data. Of course, step two also needs to be planned.

### 1 Specifying and planning and the product or service

#### *Introduction*

It is understood that those responsible for evaluation may not be the same people who specify, plan and produce or run the evaluand. This section of the checklist is for those who specify, plan and produce or run the evaluand. Nonetheless, if, as an evaluator, you find yourself asked to evaluate something which has not been specified, planned & etc. in the way suggested here, you should go back to those who specified, planned it etc. it and asked them to answer, in particular, questions 2 & 3. Without knowing what something was intended to achieve, and for whom, it is very difficult indeed to evaluate whether or not it achieved it.

Those planning and running the development venture are here described as the 'unit', as shorthand for 'educational development unit'. The same guidance applies whoever is planning and running the development venture

#	Question	Obtaining the answer	Using the answer	Comments
1	What is the evaluand?	The answer should be obvious!		
2	Whom is the evaluand intended to benefit, both directly and indirectly?	This should have been made explicit by those planning the evaluand.	Much of the evaluation process should be directed at the people whom the evaluand is intended to benefit.	
3	What is the evaluand intended to achieve?	Those planning the evaluand should be encouraged to answer this question with considerable clarity.	The intended outcome(s) of the evaluand should be made explicit. This makes it possible to identify whether or not, or to what extent, intended outcome(s) has(ve) been achieved.	It is very difficult indeed to evaluate anything; beyond finding out whether or not people liked it; without clarity over what is intended to achieve.  It should be clear and explicit how the outcomes of each evaluand will help to

				achieve the overall aim of the unit running the venture.
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## 2 Collecting and using evaluation data

### Introduction

This shows how information about each of the suggested six levels of evaluation, described in the Key Ideas paper, can be obtained.

Not all of the questions need to be asked about every evaluand. Indeed, not all of the questions are appropriate for every evaluand. Also, slightly different versions of the questions may be needed for different kinds of evaluands. This is intended as an overall guide.

For projects or is ventures which continue over a long period of time, the evaluator should have a strategy for deciding which questions they will ask each year about each of its main kinds of products and services. It is important to avoid evaluation overload.

#	Level	Question	Obtaining the answer	When asked?	Using the answer
3	1 - Awareness & knowledge	"How did the unit publicise the evaluand?"	Ask those in the unit responsible for publicity.	Any stage in the evaluation	Considered together, the answers to these three questions show the effectiveness of the unit's publicity methods for each of its products and services. Publicity methods can where necessary be adjusted in light of this information.
		"What was the take-up of the evaluand?"	These data should be available within the unit.	As determined by the unit's evaluation strategy	
		"How did you find out about [the evaluand]?"	Ask a sample of those who took up the evaluand.	"	
4	2 - Reactions	"What did you want from the evaluand?"	Ask users	Before use of the resource or participation in the activity or event	Again considered together, the answers to these questions tell the unit how far the evaluand met the initial needs of its users, and how much they liked it. The evaluand can, where necessary, be modified so that it better meets the needs of users.
		"Did it meet your needs?"	"	After use	
		"Did you like it?"	Ask users about particular aspects of the evaluand which could be changed in the future.	"	
		"How could it be improved?"			
5	3 - Engagement	"What other of the unit's activities, products and services have you used or	In the short term, ask users. In the longer term it may be possible to get some answers to this	Before , during or after use	The answers will build up a richer picture of people's previous, current and future engagement with the unit.

		been involved in?"	from a database of activities run by the unit and participants therein.		This richer picture may in turn suggest changes to unit's products and services.
		"What other of our activities, products and services may you use or be involved in the future? "	Ask users	During or after use	
6	4 - Learning from	"What kinds of things did you learn from [this particular engagement with our unit]?" "How may you use it in your teaching?"	Ask users	Immediately after use.	The two questions immediately following below are more important than this. But the answers may be harder to obtain. Many people will be willing to answer the two questions on the left. The answers can guide future products and services.
7	5 - Applying the learning	"What use have you made of what you learned from [this particular engagement with the unit]?"	Ask users. Their permission should be sought at the time use to follow them up in this way.	Usually 3–6 months after use.	Answers will show how the unit is achieving its goal, for example of helping to improve teaching the subject. Answers may also suggest how products and services can be changed to make them even more effective.
8	6 - Effects on student learning	"What effects has your changed practice had on student learning?"	Ask users. Again, their permission should be sought, at the time use, or maybe after the event in question 7 above, to follow them up in this way.	3-6 months or more after use	This is very ambitious. Not all users will feel confident, or have time, to study this. But any such data will be very valuable, and will show how the work of the unit is leading to improvements in student learning. Guidance should be provided to help staff answer this question.

### Conclusion

Some of these questions will need to be modified, for particular products and services and indeed for particular units with difference focuses. But a common and structured approach will enable a unit to answer that difficult and vital question – "What works?"

Meta data

The following table describes information about this resource (meta data) which is also used to locate the resource using search tools. Please note the terms and conditions of use under the Creative Commons licence associated with the use of this resource.

Author (s)	David Baume
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Title	An Evaluation Checklist
Keywords	Academic practice, development, evaluation, check list, Higher Education Academy
Description	<p>One of a series of guides on the evaluation of academic practice, academic development units, resources, events, activities and services.</p> <p>This guide, like the others in this series, is modified from an evaluation framework produced for the six Higher Education Academy Science, Technology, Engineering and Maths (STEM) Subject Centres in 2009. These Subject Centres consist of Biosciences, Engineering, Information and Computer Science, Materials Science, Maths Stats and OR and Physical Sciences.</p> <p>The creative commons versions of these guides were created in collaboration between David Baume and Paul Chin (<a href="mailto:pac67@bath.ac.uk">pac67@bath.ac.uk</a>) at the University of Bath, who is happy to be contacted for advice on using and adapting the Evaluation Framework for evaluation of other activities.</p>
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