

Changing Horses Mid-Stream:

Lessons Learned from Evaluator Transitions During Two ITEST

(Innovative Technology Experiences for Students & Teachers)

STEM Projects

(Science, Technology, Engineering, & Mathematics)

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It is not uncommon for programs to change evaluators partway through a grant cycle by necessity or choice. Based on our experiences as incoming and outgoing evaluators of two multi-year, out-of-school time programs funded by the National Science Foundation, we considered the questions:

What issues are associated with an evaluation transition for the evaluators, program staff, and other stakeholders?

What strategies can facilitate a smooth transition for all stakeholders?

We found the issues and strategies related to communication, context, logistics, and evaluation design. While many of these challenges and practices are common to all evaluations, some are especially important when there is a change in the evaluator.



Issues Associated with Passing the Evaluation Baton & How to Address Them

	Issues	Promising Practices		Issues	Promising Practices
COMMUNICATION	<ul style="list-style-type: none">Quickly building relationships between project stakeholders and the new evaluation team when program is underway and data collection is in progressCommunicating with evaluation and project funders	<ul style="list-style-type: none">Involve relevant stakeholders in planning (typically PI, Co-PI's, some program staff and evaluation teams)Meet to develop transition planClarify responsibilities; make expectations as explicit as possibleOverlap evaluation teams, if possibleKeep funder/program officer informed	CONTEXT	<ul style="list-style-type: none">Understanding the history and goals of the program and the evaluationUnderstanding everyone's roles, including "who is who" and "who does what"Understanding the reason(s) for the evaluator change and what it may mean for the incoming evaluator	<ul style="list-style-type: none">Have discussions with stakeholders to provide context and enhance understandingAs outgoing evaluator, try to anticipate what incoming evaluator needs to know to complete the evaluation plan and share information regarding contextRevisit the program logic modelVisit the programs and observe
	LOGISTICS	<ul style="list-style-type: none">Transferring "institutional memory" between evaluatorsHandling a gap between evaluatorsMissing critical windows for collecting data due to gaps or confusion re: responsibilitiesManaging program stakeholders' added evaluation workload due to the transition		<ul style="list-style-type: none">Develop work plan and timelines for the transition phaseTransfer all project information, materials, and data between outgoing and incoming evaluators; timely communication is criticalAs incoming evaluator, review all major documents created by outgoing evaluatorReduce disruption to program staff by minimizing changes to evaluation designStore all evaluation-related documents centrally and electronically to facilitate their transfer	EVALUATION DESIGN

If you've experienced an evaluation transition, what strategies did you find helpful?