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Out-of-School Time Resource Center Conference Evaluation Toolkit:

Users Guide for Planning, Implementing and Analyzing a Conference Evaluation

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Introduction

The Out-of-School Time Resource Center (OSTRC) is part of the University of Pennsylvania's School of Social Policy and Practice and is housed in its Center for Research on Youth and Social Policy (CRYSP). The OSTRC promotes out-of-school time (OST) student achievement by conducting research on and providing access to staff resources and professional development. To that end, the OSTRC:

1. **Helps OST staff locate resources and professional development opportunities.** The OSTRC maintains a Listserv and website, several resource directories, and an e-mail/telephone helpline. Each of which provide information on area trainings, funding sources, research studies, and similar topics.

2. **Evaluates OST staff resources and professional development, and suggests which are most effective.** The OSTRC develops and uses "tools," such as surveys and focus groups, to measure the impact of staff resources and professional development on OST staff, programs, and students.

3. **Recommends changes in practice and policy.** By providing OST staff with access to diverse resources, and evaluating the impact of these resources on student achievement, the OSTRC strives to influence investments in OST staff support and professional development.

How to Use this Toolkit

Now that you have the OSTRC Conference Evaluation Toolkit, what do you do? The OSTRC describes conference evaluation as including three phases: planning, implementation, and analysis. The Users Guide will take you through each phase, providing recommendations for how to perform a successful conference evaluation. These recommendations are summarized in the following chart: "Promising Practices for Out-of-School Time Conference Evaluation".

OSTRC's Promising Practices for OST Conference Evaluation		
Phase	**Practice**	☑
Planning	First decide on the end result (i.e., what should be learned from the evaluation).	☐
	Decide what data must be gathered to meet long-term goals; then choose evaluation instruments (and combinations of instruments) accordingly.	☐
	Plan the evaluation well in advance – don't let it be an afterthought.	☐
	Discuss the evaluation, early and often, with key stakeholders such as conference co-sponsors and conference planning committee members.	☐
	Facilitate open discussions with key stakeholders re: the benefits of performing a successful evaluation: providing essential information to multiple parties and improving future conferences.	☐
	When soliciting workshop proposals and/or specific presentations, introduce the evaluation to prospective presenters.	☐
	When disseminating conference advertisements and registration materials, introduce the evaluation to prospective participants.	☐
	Create written materials (based on OSTRC templates in Appendix A) to communicate the importance of the evaluation process to stakeholders, participants, presenters, and conference volunteers.	☐
Implementation	Focus on garnering buy-in during the conference by clearly communicating the evaluation purpose and process to participants, presenters, and conference volunteers.	☐
	Copy each type of survey (e.g., Pre Workshop vs. Post Workshop Surveys) on different color paper.	☐
	Distribute prepared written materials to participants, presenters, and conference volunteers.	☐
	Assign conference volunteers as "room monitors" in each workshop who will be responsible for alerting the audience, as well as distributing and collecting surveys.	☐
Analysis	Enlist qualified professionals to analyze and interpret survey results for key stakeholders. Beware of claiming causal relationships when interpreting results.	☐
	Use the data to identify and focus on specific trends, questions, concerns, etc.	☐
	Acknowledge limitations of survey data in all written reports.	☐

Planning

Selecting and Creating Surveys

When planning a conference evaluation, it is important to first determine the end result(s). Next, an organization can proceed to choosing an effective evaluation process.

This process should take into consideration both short-term and long-term organizational goals to ensure the evaluation results are as useful as possible. For example, if a funder requires a brief report on the response to a conference, a simple evaluation format (such as the OSTRC's Survey Combination Option #3) may meet this need. However, if an organization wishes to document how information from specific trainings was utilized, a more complex design may be preferable (such as the OSTRC's Survey Combination Option #1).

The Overall Conference Evaluation and the Comprehensive Conference Evaluation are surveys to which an organization can add conference-specific questions. An organization may need to evaluate conference-specific data since many conferences include unique elements (e.g., multiple keynote speakers, a panel discussion, events/performances, etc.). In such a case, these particular surveys can be customized to gather information that an organization may find particularly relevant.

Communication

Once an organization has outlined the evaluation process and has chosen the evaluation instruments, it is time to begin communicating the importance of the evaluation to others. To ensure the effectiveness and success of a conference evaluation, it is important to gain buy-in.

Facilitating open discussions with key stakeholders, such as conference co-sponsoring organizations and/or conference planning committee members (if applicable), is extremely helpful. The benefits of performing a successful evaluation include: refining and improving the evaluation process, providing essential evaluation information to multiple parties, and improving future conferences.

Introducing the evaluation process to potential workshop presenters as soon as possible is also important. The OSTRC recommends that any literature distributed by an organization to solicit potential presenters should include a brief description of the evaluation process, since each workshop session requires designating time for participants to complete surveys.

Let's look at a specific example:

Survey Combination Option #1 has been selected for a conference with 60-minute workshop sessions.

60 total minutes

-	3-5 minutes for Pre Workshop Survey
-	5-7 minutes for Post Workshop Survey
=	**48-52 minutes of actual presentation time**

This information is necessary for a presenter to know upfront as they prepare their proposals.

This same principle applies to participants. The OSTRC recommends that an organization introduce the evaluation to prospective participants when disseminating conference advertisements and registration materials.

In addition, creating *written materials* that communicate the evaluation process and its importance to the audience is essential. The OSTRC has found that both participants and presenters respond best to this evaluation process when its purpose and importance are highlighted in pre-conference and on-site literature. Appendix A highlights templates that can be customized through which an organization can communicate this message to its audience. Emphasize that all survey responses will remain ***confidential*** and be used to help plan future conferences. Introducing the evaluation in this way communicates the importance of the evaluation to all involved and will contribute to its ultimate success.

Implementation

To implement the evaluation process, organizations should determine a survey distribution and collection system well in advance. Doing so at least 3-4 months beforehand is recommended.

For the Overall Conference Surveys, participants should be given the surveys in their conference packets and then reminded to return them before leaving the conference. A helpful idea is to provide one central location where participants may submit their surveys.

Assigning conference volunteers to act as “room monitors” in each workshop session provides a systematic and effective way of disseminating and collecting *workshop* surveys. The room monitors should understand:

- The organization’s process of survey distribution and collection,
- How to answer questions from participants,
- Who to seek out if they cannot answer a question, and
- How to communicate their role within the session to the presenter(s) before the session begins.

Room monitors can also function as “timekeepers”. They can introduce the presenter(s) after participants have filled out the Pre Workshop Survey (if applicable) and notify the presenter(s) when it is time to end the presentation to allow participants time to complete the Post-Workshop Survey (if applicable).

The OSTRC has found it helpful to copy each type of survey on different color paper. For example, all Pre Workshop Surveys can be copied on green paper, all Post Workshop Surveys on blue paper, and all Overall Conference Surveys on pink paper.

Although this may seem an odd recommendation, experience has taught us that doing so significantly helps participants recognize that they are filling out a different survey each time.

At the time of registration, prepared written materials should be distributed to participants, presenters, and conference volunteers. Address the evaluation and its purpose in the opening session of the conference. Highlighting this process in multiple ways facilitates an increased understanding of the evaluation process, and should increase the survey response rate.

Analysis

The surveys in this Toolkit provide a wealth of information for analysis. In general, the series of survey instruments utilizes a rich mix of close-ended (quantitative) and open-ended (qualitative) questions.

Before discussing the levels at which this survey data can be analyzed, consider the following tips for conducting a successful analysis:

- Enlist a qualified professional to analyze and interpret survey results for key stakeholders. These surveys produce large quantities of helpful information and should be analyzed by an experienced individual.
- Use the data to identify and focus on specific trends, questions and/or concerns that are important to the sponsoring organization(s).
- Incorporate the survey results into future planning efforts.

Basic Analysis: Reporting Frequencies and Demographics

An organization should first determine its desired results and then choose surveys that will best gather that information. The most basic analysis of these data determines “frequencies” (which any statistical software can calculate). The term “frequencies” refers to how often participants responded to specific questions such as 75% reported to be satisfied with the conference, 82% felt the content was relevant, 64% cited that they plan to use the new information etc. In many cases, this information alone can speak to how helpful the conference was to participants.

Additional information included in a basic analysis is the demographic breakdown of a conference. This includes the number of participants in various categories of gender, age, race/ethnicity, educational level, job category, years of experience in the field, etc. Analyzing demographics with respect to frequencies provides a useful perspective in terms of the success of the conference as well as the type of audience attracted to the event. These data sets can also be used to discover if the impact of the conference differs depending on personal characteristics of its participants.

Intermediate Analysis: Making Comparisons within the Data

A more in-depth form of analysis draws upon the unique design of the surveys and allows several comparisons to be made. One comparison can be made between pre- and post-workshop levels of knowledge, skills and beliefs towards the importance of the topic in terms of benefiting program youth. The experienced analyst can measure workshop effectiveness by discussing the changes in each of these levels. For example, as a result of attending a specific workshop, participants may show a 15% increase in knowledge, a 10% increase in skills, and a 5% increase in belief in the importance of the workshop topic in terms of benefiting program youth.

A second comparison can be made between the Post and Follow-Up Workshop Surveys. These surveys were designed to measure the "intended" application (in the Post Workshop Survey) as well as the "actual" application (in the Follow-Up Workshop Survey). While the addition of a follow-up survey is not unique to this Toolkit, it is not often used within the context of a conference. In this way, information gathered from the follow-up surveys can provide beneficial information regarding the impact of attending a conference.

A third comparison can be made between the perceptions of the workshop by the participants (in the Post Workshop Survey) and the presenters (in the Presenter Self-Assessment Survey). This is possible because the two surveys ask a series of identical questions to both parties. Specifically, both surveys ask questions regarding the usefulness of workshop activities, the effectiveness of the presentations, and the quality of the presenters' skills in terms of facilitating the workshops.

A comprehensive analysis would group participants according to one demographic variable (such as job category) and compare responses to various survey questions. For example, the OSTRC discovered that a person's level of education can affect their satisfaction with a particular workshop format, as well as the ease with which they can apply information. In this case, an intermediate analysis may show that Master's level participants reported a higher satisfaction on average than Bachelor's level participants.

Advanced Analysis: Significance Testing

The most advanced level of analysis that can be performed with this data is significance testing. There are a few prerequisites to performing such tests on conference data. First, a conference must have a substantial number of participants who are fully engaged in the evaluation process. Second, a conference must yield a high response rate for surveys with "unique identifiers." That is, participants are asked to produce a "unique identifier" according to survey instructions. In most cases, this identifier is the first letter of a person's first name plus the last 4 digits in their home telephone number (e.g., M-8426). This allows analysts to connect individual participants' Pre, Post and Follow-Up Workshop surveys without breeching confidentiality. If a large number of participants include their "unique identifiers," then it is possible to track the processes of learning and application over time.

The surveys are designed to provide substantial comparative information on various topics and categories. Using significance testing, an analyst would set up a regression analysis to determine which aspects of a conference or workshop contribute most to a specific question of interest such as increases in knowledge, acquisition of skills, or changes in belief.

It may also be feasible to use the regression analysis to predict survey responses. If an organization is interested in learning which types of Post-Workshop Survey responses are most likely to result in positive responses on a Follow-Up Workshop Survey (such as the information being utilized in a program and making a positive impact on program youth), a regression analysis of a solid sample could be helpful. A regression could also identify which workshop characteristics lead to the completion of a Follow-Up Survey, or which participant characteristics predict higher levels of impact.

Data Limitations

There are many examples of the ways in which the survey information can be used to inform stakeholders. As with any surveys, however, there are limitations to the interpretation and application.

Workshop Limitations

Research shows that learning experiences are more effective when they take place over a period of time and include a variety of activities.[1] However, typical conference workshops may last 1.5 - 3 hours and are often mainly comprised of lecture. From the perspective of Adult Learning Theory, this type of experience does not foster *optimal* learning. Also, conference participants often attend multiple workshops per day and may receive a great deal of literature to review at a later time. This can be stimulating but also overwhelming.

Therefore, typical conference workshops are neither ideal settings for producing significant changes in long-term knowledge/skill attainment nor for enacting long-term changes within a program or organization. However, these conference formats afford excellent opportunities for individuals to consider new information and brainstorm as to how content can be used to improve their programs/organizations.

[1] CITATIONS

Contributing Factors

Other factors may contribute to changes made within a program/organization that have little to do with the workshop and/or conference. The OSTRC Follow-Up Workshop surveys are based on change theory research[2] and include several measures to assess the effectiveness with which individuals use new information. However, surveying cannot identify every factor that may have contributed to change. Therefore, one must regard the survey results as indications of success (or failure) rather than solid evidence of a causal relationship between a workshop/conference and program improvement.

Self-Reporting

Another limitation with this type of data is that it is self-reported. As with any survey of this nature, researchers rely on participants to provide accurate responses to survey questions. The accuracy of information may be questionable for several reasons. However, participants generally have few reasons to "lie" or exaggerate on these surveys, due to the benign nature of the survey content. Participants are not asked to provide information that is personal or incriminating but rather, their opinions regarding a professional development experience. Consequently this limitation most likely is not a significant limitation, but should be considered when analyzing the findings.

Self-Selection Bias

Survey data are also subject to "self-selection bias," which means that participants choose whether or not to complete surveys and return them. The analysis may miss the perspective of participants who did not choose to fill out any surveys. These limitations are common and cannot be corrected, but are important to acknowledge when interpreting the findings.

[2] CITATIONS

Number of Surveys

Lastly, the analysis depends upon the number of completed surveys rather than the number of conference participants. Therefore, any claims made as a result of a survey should address how many surveys were completed compared with how many were disseminated. Calculating a *response rate* from this information (the number of completed surveys divided by the number of participants) is beneficial when making any statements regarding the findings. Otherwise, information may be inadvertently overemphasized or underemphasized.

Appendix A: Out-of-School Time Resource Center Professional Development Evaluation Toolkit Templates

Letter for Conference Participants

Dear Conference Participant,

The evaluation process in which you will be involved consists of several components:

1. **Pre and Post Workshop Surveys,** to be completed and submitted by participants at the beginning and end of each individual session.
2. **Conference Evaluation Surveys**, to be completed and submitted by participants at the end of the conference.
3. **Follow-Up Surveys,** which will be e-mailed to participants one month after the conference to determine if they applied what they learned.
4. **Presenter Self-Assessments,** to be completed and submitted by presenters at the end of each individual session.

Please know that:

* **Your survey responses will remain completely confidential.**
* **No individual names will be collected or reported as information from the surveys will be reported on an aggregate level.**
* **In order to maintain the confidentiality of your responses, the survey will ask you to provide a "password": the first letter of your first name + the last four digits in your home telephone number (e.g., M-8426). If you do not have a home telephone number, please use another contact number, such as a cell phone. Use this password consistently on all completed surveys.**

The evaluation process is being implemented for three primary reasons:

1. To refine and improve the evaluation process of this conference's offerings.
2. To provide essential evaluation information to multiple parties such as conference co-sponsors, funding entities, and future conference planning committees.
3. To improve future conferences.

The conference co-sponsors thank you for participating in this professional development evaluation process. We welcome any questions, comments and/or suggestions you may have. Please see [INSERT CONTACT PERSON] for further assistance.

Letter for Conference Presenters

Dear Conference Workshop Presenter,

The [NAME OF ORGANIZATION] is conducting the evaluation for this conference.

The evaluation process in which you will be involved consists of several components:

1. **Pre and Post Workshop Surveys for participants**
2. **Overall Conference Surveys for participants and presenters**
3. **Follow-Up Workshop Surveys will be emailed to participants in one month to find out if they had the opportunity to use what they learned**
4. **Presenter Self-Assessment Surveys for presenters whose purpose is to provide you with the opportunity to provide feedback on your own workshop**

The evaluation process is being implemented for three primary reasons:

1. To refine and improve the evaluation process of this conference's offerings.
2. To provide essential evaluation information to multiple parties such as conference co-sponsors, funding entities, and future conference planning committees.
3. To improve future conferences.

The conference co-sponsor has assigned a volunteer to act as a Room Monitor within your workshop. This individual will oversee the distribution and collection of workshop surveys, field participant questions regarding the surveys, and be a timekeeper.

Please allow 5 minutes for participants to complete Pre and Post Workshop surveys both before and after your session.

Please feel free to share questions or concerns with the [NAME OF ORGANIZATION] or other conference co-sponsors during or after the conference.

We appreciate your cooperation!

Instruction Letter for Volunteer Room Monitors

Dear Volunteer Room Monitor,

The [NAME OF ORGANIZATION] is conducting an evaluation of today's conference. As a room monitor, you have been asked to assist the [NAME OF ORGANIZATION] and the conference co-sponsors in this process. The evaluation consists of several components: Pre and Post Workshop Surveys, Overall Conference Surveys, Follow-Up Surveys (which will be emailed to participants in one month to find out if they had the opportunity to use what they learned), and Presenter Self-Assessments.

The evaluation process is being implemented for three primary reasons: to refine and improve the evaluation process of this conference's offerings; to provide essential evaluation information to multiple parties such as conference co-sponsors, funding entities, and future conference planning committees; and to improve future conferences.

As a room monitor, you will receive a packet for the workshop(s) to which you are assigned. The packet will contain a Letter to Presenters, a set of Pre-Workshop and Post-Workshop Surveys for the workshop participants, as well as 1-2 Presenter Self-Assessment Surveys. As a facilitator, please:

- Communicate with the presenter(s) before the workshop about the time constraints of this evaluation process. The Pre-Workshop Surveys should take 3-5 minutes to complete and the Post-Workshop Surveys about 5-7 minutes.
- Distribute the Pre-Workshop Surveys as participants enter the room.
- Collect the Pre-Workshop Surveys before the workshop begins.
- Remember to discreetly ask those participants entering the room after the presentation has begun (and the surveys collected) to complete a Pre-Workshop Survey.
- Distribute the Post-Workshop Surveys 5 minutes before the workshop is scheduled to end (e.g., if the workshop is from 10-10:50am, distribute forms at 10:45am).
- Collect the Post-Workshop Surveys from each participant as they leave the room.

* **Explain to participants why they are being asked to provide the first demographic question on each survey (which in this case is the first letter of their first name + the last four digits in their home telephone number). The purpose is to gather confidential, continuous data over the course of a conference. Hence, each participant needs to provide a "password" or "identifier" (<u>instead of using their name</u>). This code serves to <u>maintain the confidentiality</u> of their survey responses since this will in no way be connected with their name.**

Please feel free to share questions or concerns with the [NAME OF ORGANIZATION] or conference co-sponsors during or after the conference. ***We appreciate your assistance!***

Sincerely,

[NAME OF ORGANIZATION]