



Can a workbook work? Examining whether a practitioner evaluation toolkit can promote instrumental use



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ABSTRACT

In large-scale, multi-site contexts, developing and disseminating practitioner-oriented evaluation toolkits are an increasingly common strategy for building evaluation capacity. Toolkits explain the evaluation process, present evaluation design choices, and offer step-by-step guidance to practitioners. To date, there has been limited research on whether such resources truly foster the successful design, implementation, and use of evaluation findings. In this paper, we describe a multi-site project in which we developed a practitioner evaluation toolkit and then studied the extent to which the toolkit and accompanying technical assistance was effective in promoting successful completion of local-level evaluations and fostering instrumental use of the findings (i.e., whether programs directly used their findings to improve practice, see Patton, 2008). Forensic nurse practitioners from six geographically dispersed service programs completed methodologically rigorous evaluations; furthermore, all six programs used the findings to create programmatic and community-level changes to improve local practice. Implications for evaluation capacity building are discussed.

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1. Introduction

In large-scale, multi-site evaluations, developing and disseminating practitioner-oriented evaluation workbooks or toolkits are an increasingly common strategy for evaluation capacity building (see examples produced by the Kellogg Foundation, the United Way, the World Bank, the Pell Institute, among others).⁵ Toolkits demystify the evaluation process, present evaluation options, explain design choices, and offer step-by-step guidance to

practitioners. However, whether such resources can truly build evaluation capacity and foster the successful design, implementation, and use of evaluation findings merits empirical examination. Toolkits may be *efficient* in providing resources to many programs and practitioners, but they may or may not be *effective*. In this paper, we describe a multi-site project in which we developed a practitioner evaluation toolkit and then studied the extent to which the toolkit and accompanying technical assistance was effective in promoting successful completion of local-level evaluations and fostering instrumental use of the findings. In this project, we conceptualized ‘instrumental use’ consistent with Patton (2008) definition: “Instrumental use refer to evaluation findings directly informing a decision or contributing to solving a problem; the findings are linked to some subsequent action and in that sense become an *instrument* of action” (p. 102, emphasis in original).

1.1. Developing toolkits to develop evaluation capacity in local-level programs

The fundamental premise of evaluation toolkits is that the skills and methods of evaluation are teachable, and that with

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⁵ In this manuscript, we will be using the terms ‘workbook’ and ‘toolkit’ interchangeably to refer to comprehensive evaluation guides for practitioners. As noted below in Section 1.1, there is considerable variability in the literature in the extent to which these guides are content-specific and design-prescriptive.

appropriate guidance and support, practitioners can evaluate their work and use the findings to improve their practice (Cousins & Chouinard, 2012; Fetterman & Wandersman, 2005; Patton, 2008; Preskill & Boyle, 2008). Toolkits vary considerably in the extent to which they are “generalist” resources on evaluation or specific manuals for how to implement a specific design(s); furthermore, some workbooks are intended to span multiple substantive domains (e.g., “preventive health interventions”) whereas others are tailored to a specific content domain and service program. Typically, most toolkits provide “evaluation 101” instruction and explain evaluation design options, and then some go further to articulate step-by-step procedures for data collection and analysis, suggest strategies for utilization, and provide sample tools, measures, and other resources practitioners can use outright or adapt to their specific needs. Toolkits are a potentially cost-efficient way to build the evaluation capacity of organizations in that they can address multiple capacity needs, including: building evaluation knowledge, fostering positive dispositions toward evaluation, and developing evaluation skills (Wandersman, Imm, Chinman, & Kaftarian, 2000; Wandersman et al., 2008). In practice, toolkits can implement multiple capacity-building strategies simultaneously: they are a written resource that can be shared among multiple staff and stakeholders, their educational aspects can act as a substitute for more costly in-person training, and when accompanied by data analysis tools, they enhance technological capacity (Campbell et al., 2004; Dyckhoff, Zielke, Bultmann, Chatti, & Schroeder, 2012).

1.2. Evaluating whether toolkits develop capacity in local-level programs

To date, only a handful of projects have formally studied whether evaluation toolkits can build evaluation capacity and foster evaluation use. In one of the first studies to examine this issue, Oliver, MacBean, Conole, and Harvey (2002) developed a toolkit to help educators evaluate learning outcomes among students, and then they had both novice and experienced evaluators use the toolkit to design an evaluation. Although this project did not study actual implementation of the planned evaluations, Oliver et al. (2002) found that the toolkit was effective in helping both experienced and less-experienced evaluators develop good quality, tailored evaluation designs. As to whether this toolkit would support actual instrumental use of the design and the findings resulting from the design is not known (as it was not the focus of this project).

Expanding the scope to consider whether toolkits can support actual implementation, Campbell et al. (2004) conducted a state-wide project with human service organizations with the goal of using evaluation workbooks and technical assistance (e.g., in-person trainings, site-specific consultation) to guide all state-funded sexual assault services and prevention programs through the process of planning, implementing, and using evaluating findings to improve practice. Program staff reported high satisfaction with the resources provided, and when the research/evaluation team reviewed the programs' reports that they filed with the state funders, there was clear evidence that all sites had been able to successfully conduct their evaluations, with action plans for using the findings to improve practice (i.e., an intention for instrumental use). At a one-year follow-up interview, there had been considerable staff turnover in most agencies, but the new staff indicated that they were aware of and were continuing to use the evaluation workbooks (i.e., evaluation capacity building).

Taking implementation to an even larger scale, the *Getting to Outcomes* toolkit was designed to be a generalized resource for planning and evaluating preventive interventions' outcomes across multiple substantive domains (unlike the Oliver et al.,

2002 and Campbell et al., 2004 toolkits, which were tailored to specific content domains) (Chinman et al., 2008; Chinman, Tremain, Imm, & Wandersman, 2009; Hunter et al., 2009; Wandersman et al., 2000). *GTO* guides programs through a series of 10 questions that help staff analyze needs and resources, articulate goals and use of best practices, develop organizational capacity for evaluation, plan and implement evaluations, and develop approaches for continuous quality improvement and sustainability.

A multi-site evaluation of *GTO* and accompanying technical assistance found that these resources were effective at building both individual capacity and program performance, as well using outcome data for ongoing program improvement (i.e., instrumental use) (Chinman et al., 2008). An online, interactive format of *GTO* has also been developed and evaluated (*iGTO*) (Chinman et al., 2009). Fifty-six coalitions in two states used *iGTO* to develop experimental and quasi-experimental designs of their programs. *iGTO* was effective in supporting increased program performance, but participant perceptions of the online system were mixed and no participants reported intending to continue to use the system after the completion of the study (Chinman et al., 2009). More recently, Chinman, Hunter, and Ebener (2012) collaborated with a substance abuse service program that had participated in a *GTO* project to study how the evaluations contributed to instrumental use. Couched within a CQI (continuous quality improvement) model, the authors found that program staff were able to implement CQI approaches to create a “bridge between conducting self evaluation and making concrete changes to improve programming” (p. 613).

GTO, like most evaluation toolkits, focus on teaching program staff how to evaluate discrete, well-defined programmatic outcomes, but toolkits may also be effective in helping programs identify and evaluate more intangible aspects of their work related to programmatic values, such as equality or empowerment. For example, in a multi-national toolkit project, Burford et al. (2013) created and evaluated the *WeValue* toolkit, which helped community-based and non-governmental organizations assess values-based achievements, such as open and respectful communication, equal participation in decision making, and transparency in organizational mission and activities. The toolkit and accompanying training were successful in helping all sites develop at least one assessment tool and collect local data; in addition, the toolkit helped programs make sustained changes to their monitoring and evaluation strategies.

Taken together, the results of these projects suggest that toolkits can be effective in helping program staff learn about evaluation and implement evaluation projects. However, the literature has been less specific on exactly how programs have directly used their outcome evaluation findings to improve practice (i.e., instrumental use; Patton, 2008). Studies that have evaluated toolkits tend to report that instrumental use occurred, without demonstrating what exactly that use was and how it directly stemmed from the resources provided (i.e., the toolkit and technical assistance). To address this gap in the literature, we developed and evaluated a domain-specific toolkit (for sexual assault nurse practitioner programs) in a national-scale, multi-site project, with an emphasis on identifying evidence of instrumental use (i.e., using findings to create programmatic changes). To set the stage for this project, we will briefly describe the content domain of this service program and its intervention model.

1.3. Case example: developing & evaluating a toolkit for sexual assault nurse examiner (SANE) programs

Sexual violence is a pervasive social problem: national epidemiological data indicate that 18–25% of women are raped

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