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The Out-of-School Time Resource Center Survey Toolkit[1]

1. Introduction

The Out-of-School Time Resource Center (OSTRC) Survey Toolkit is a compilation of resources and research-based surveys to evaluate out-of-school time (OST) professional development (PD) workshops and conferences. In addition to providing resources to create surveys, the Toolkit contains research-based surveys designed, tested, and used by the OSTRC. The surveys may be either customized in collaboration with the OSTRC, or used as is, to evaluate OST professional development workshops and conferences. To request the OSTRC surveys, contact Lisa Colby, Senior Research Coordinator, at lcolby@sp2.upenn.edu or 215.898.2505.

2. Evaluating OST Workshops and Conferences

Defining Professional Development

The OSTRC believes that evaluation is critical to improving and strengthening OST PD. The OSTRC defines PD as:

> Activities, resources, and supports that help out-of-school time practitioners work with or on behalf of children and youth. In this context, "practitioners" can be volunteers, teenagers, parents, or other non-staff members, provided that the PD experience transfers to and culminates in supporting OST youth participants.

In the OST field, PD is often used to describe staff workshops and conferences. While they are a critical component of a PD plan, workshops and conferences are only two PD formats. Technical assistance, peer mentoring, apprenticeships, coaching, observations, professional networks, and on-line support are equally beneficial though less common PD formats.

The OSTRC surveys are designed for workshops, conferences and peer networking meetings. It is important, however, to assess the impact of all PD activities using other methodologies. For example, organizations should incorporate focus groups, key informant interviews, and observations of PD activities to further assess the impact of PD on participants. The OSTRC is in the process of expanding its evaluation methodology to include a qualitative component. To that end, the OSTRC created a workshop observation tool to qualitatively assess PD workshops.

[1]Information in this toolkit obtained from: **Fowler, Jr., F.J. (1995). Improving Survey Questions. CA: Sage Publications.**

Evaluating Professional Development

Professional Development evaluation should be intimately connected to program goals and objectives; that is, it should measure more than satisfaction or feeling good. Ideally, PD evaluation should ascertain participant satisfaction, acquisition of new knowledge or skills, sense of professional identity, organizational integration, program application, and extension to other staff and settings. The ultimate goal of OST professional development is to positively impact youth.

Evaluation Methods

Quantitative methodology (analysis of numerical data) is typically utilized to evaluate workshops and conferences. Most often, this method includes surveys - written, oral, or electronic. Qualitative (narrative) methodology can also be used to evaluate workshops and conferences. Most often, this method includes interviews, focus groups, and observations. Although surveys are efficient and far-reaching tools, researchers and practitioners are encouraged to use more than one method of evaluation to gain a comprehensive understanding of participants' experiences.

3. Workshop and Conference Evaluation Preparation

A meaningful workshop and conference evaluation requires advanced planning by the event organizers or planning committee. Whether the evaluation is conducted internally by the host organization, or externally by a neutral, outside organization, the evaluator is an integral member of the planning committee. Incorporating the following steps will help in preparing, and ultimately implementing, a successful workshop or conference evaluation.

Establish Professional Development Goals and Objectives

Clear PD goals and objectives are important for conducting meaningful workshop and conference evaluations. Establishing goals and objectives will help organizers and planners understand if the event was successful. Consider these questions when establishing PD goals and objectives:

- What is the overall goal of the professional development opportunity? (*Example: To enhance student outcomes through improved staff performance.*)
- What are the objectives? Objectives should be **S.M.A.R.T**:
    - **S**pecific
    - **M**easurable
    - **A**ppropriate
    - **R**ealistic
    - **T**ime Specific

S.M.A.R.T. examples:

At the conclusion of the workshop, 80% of the attendees will report an average of .5 points increase in their knowledge of the workshop topic.

At the conclusion of the conference, 75% of the attendees will report an overall satisfaction average of 4.0 with the conference.

Review Professional Development Promising Practices

Research suggests that including opportunities for self-direction and reflection, encouraging real-life applications, promoting teamwork and inviting knowledgeable, well-organized presenters will result in greater satisfaction and application amongst the participants.

Solicit and Prepare Presenters

Solicit presenters using a competitive process such as a formal request for proposals (i.e., RFP). Presentations should be interactive, engaging and promote new learning. Reviewing presentation proposals is crucial to ensuring that the presentations embody the goals and objectives of the workshop or conference. Share the workshop survey with the presenters so that they know how their sessions are being evaluated.

Alert/Inform Stakeholders

Communication among key stakeholders such as sponsors, funding agencies, providers and city officials helps to establish buy-in about the importance of evaluation and the event itself. Additionally, it helps to market the event to a wider audience.

4. Using Surveys to Evaluate OST Workshops and Conferences

A survey provides concrete data about the participants' level of satisfaction at a workshop or conference. Additionally, it provides feedback on immediate achievements such as the participants' acquisition of new knowledge and skills and level of satisfaction with location, temperature and/or amenities. Integrating surveys into the overall evaluation process, allows organizations to gather feedback from participants about their experiences and it helps the planning committee determine whether the identified goals and objectives were achieved.

What is a survey:

From a quick show of hands to a detailed online questionnaire, a survey is a basic evaluation tool. Surveys are infinitely flexible and allow for any combination of closed and open questions.

Why use a survey:

A survey is a relatively inexpensive and efficient method for obtaining feedback from workshop and conference participants. Using a survey, particularly an electronic survey, is an easy method to gather data from large numbers of people from diverse geographic locations. Data collected from the surveys provide important information about the audience—what they liked, if they plan to apply what they learned, and the youth population(s) with which they work. In addition, surveys offer targeted feedback regarding specific presenters or events. Further, surveys supply data for funding agencies and stakeholders—both are interested in outcomes and surveys can provide a pre-event baseline and post-event data. Surveys also give participants the opportunity to evaluate the presenter, content, and overall user experience for an event or program. The results can be used to inform marketing strategies and plan future events.

When to use a survey:

Surveys typically are distributed at the conclusion of a workshop or conference. They may be paper-surveys or electronically distributed to the participants via email. Follow-up surveys can be electronically distributed up to six or eight weeks after the event to measure knowledge and skill retention and application in programs.

How to use a survey:

From setting your evaluation goals and objectives to writing survey questions, the OSTRC Survey Toolkit provides resources and information to plan and evaluate workshops and conferences.

5. Designing Surveys

There are number of principles to consider when designing surveys. In general, think about incorporating the following elements when designing surveys:

Make it User-Friendly

Surveys should be easy to complete and not too time-consuming. Consider the respondents' education and reading levels when designing the survey questions. Use basic concepts and words. Avoid lofty, intellectual words or phrases that may be misunderstood by the respondents. Simple is best.

Ask Only Useful Questions

Only include questions that will inform your needs. Avoid the 'nice to know' questions.

Provide a Clear Introduction

Keep the introduction brief so that the respondents do not lose interest before beginning to answer the questions. The introduction should detail the purpose of the survey and how the information collected will be used. In addition, include the contact information for a person that respondents can contact with questions or concerns.

Decrease Respondent Burden

This occurs when the respondents develop negative feelings about the survey that in turn can impact the results. To reduce this consequence, consider the length of the survey and the effort required to complete the tool (e.g., open versus close ended questions—open ended questions require more effort because the respondent s are forced to provide their own responses instead of choosing from a pre-defined list.). In addition, ensure that all questions are asked for a purpose and all information collected will be utilized.

Survey Design Elements

The design and presentation of the survey form is important because it influences respondents' likelihood of completing a survey. Incorporating the following elements into the survey design will reduce the respondents' burden:

- **Group questions to organize content.** For example, group all workshop questions together. It may confuse respondents if question one refers to the satisfaction of the workshop and question two asks for the respondents' gender. Similarly, group all demographic questions together.
- **Order questions based on difficulty.** Less intrusive and easier questions should be at the beginning to encourage respondents to complete the survey. More difficult and intrusive (e.g., demographics) should be at the end of the survey.
- **Omit words when possible.** Be succinct. For example, if a group of questions is about the presenter, include a heading, *The presenter/s…..* instead of beginning each question with *The presenter/s*.
- **Avoid excessive visual noise; use a simple design that is clear.** For example, avoid excessive bolding and italics that could distract the respondent. Keep the font size consistent. Limit white space around the survey.
- **Align information.** The respondents' eyes move in a straight line and survey-takers may miss questions that are outside that path.

Pre-Test the Survey

Recruit colleagues to complete the survey to identify weaknesses and potential difficulties within the survey. This will further enhance the survey and identify any pitfalls in the survey.

Use Incentives

Offer respondents an incentive, such as entry into a raffle for a free conference registration, for completing the survey.

Share the Results

Publish and share the results of any information requested from the respondents. For example, provide quarterly reports on the workshop survey results. Inform the respondents how the information from the surveys will be utilized by the sponsor organization.

6. Types of Survey Questions

Survey questions may be closed-ended (quantitative) or open-ended (qualitative).

Closed-Ended (quantitative):

Respondents answer questions with a designated response such as yes/no or a ranking scale such as strongly agree/agree/strongly disagree.

> **Pros:** The data are easy to enter into a database and analyze. Since the questions have specific responses, they are more likely to communicate similar meanings. These questions are easier for the respondents to answer.
>
> **Cons:** The respondents are 'forced' to choose a response that may vary from their true feelings, thoughts or understanding. There can be a lack of context for responses.

Open-Ended (qualitative):

Respondents provide an answer in their own words. These types of questions are helpful to understanding more about an event.

> **Pros:** These provide an opportunity for respondents to report more information about feelings, attitudes and understanding. They also provide additional context to analyze close-ended questions.
>
> **Cons:** The time to complete data entry and analysis increases.

Tips for Writing Survey Questions

- Avoid ambiguous words or words that could be misinterpreted (i.e., the word has multiple meanings).
- Avoid questions that attempt to guide the respondent. *Avoid: How much difficulty did you have finding the conference facility? This question presumes that the respondent had difficulty finding the conference facility. Instead, phrase the question this way: Locating the conference facility was: easy, somewhat easy, somewhat difficult, difficult.*
- Avoid asking two things in one question *Avoid: I was satisfied with the workshop and I learned new information. The respondent may have been satisfied, but did not learn new information. When two things are asked in a question, the respondent becomes confused and cannot accurately respond to the question.*
- Avoid double negatives. *Avoid: Do you disagree that the workshop should not be held in the evening? The wording of this question is confusing. Instead, phrase the question this way: I prefer workshops to be held in the: morning, afternoon, evening, no preference.*

- Ensure that answer categories (for quantitative questions) are mutually exclusive and exhaustive. *Avoid: How many workshop sessions did you attend? 1-3; 3-5; 5-7. This answer is not mutually exclusive because the answer categories overlap. Additionally, it is not exhaustive because a respondent may not have attended any workshop sessions and this is not a choice.*

7. Customization and Modification of the OSTRC Surveys

The OSTRC will customize or modify the surveys based on the needs of an organization. The surveys assess seven measures of professional development:

- Measure One: Satisfaction
- Measure Two: Acquisition of new knowledge and skills
- Measure Three: Belief in the importance of the topic
- Measure Four: Perception of professional identity
- Measure Five: Institutional support and integration
- Measure Six: Application
- Measure Seven: Extension/modification

The OSTRC created four matrices to illustrate the research behind each question on its Overall Conference and Workshop Surveys. The conference and workshop "Levels of Evaluation" matrices indicate which survey questions measure or relate to each measure of evaluation. The "Areas of Research" matrices identify the fields of research that contributed to developing each survey question. Contact Lisa Colby at lcolby@sp2.upenn.edu to request these matrices.

The matrices present the reasoning behind each survey question. This, in turn, will guide the decision-making process for customizing or modifying the surveys. In addition, understanding the rationale behind each question can assist professional development planners with interpreting the results and, subsequently, identifying the areas of their conferences and workshops that need to be strengthened, reorganized, or otherwise modified.

7. Implementing Surveys

In conjunction with creating the surveys, PD organizers and planners must decide *how* to implement the surveys. Each methodology—paper or web-based—has pros and cons. Consider the organization's staffing structure and budget when deciding whether to use paper or web-based surveys.

Paper versus Web

Paper surveys work well for one-time workshops and for individual workshops at conferences. The paper survey can be distributed immediately and participants provide answers while the workshop material is fresh.

Pros: These are completed immediately by participants. They capture responses from participants who may not have access to computers and/or participants who are not comfortable with computers.

Cons: These require staff labor for distributing, collecting and entering all data. Paper copies can be expensive for large events.

Web-based surveys typically work well for an overall conference evaluation. Web-based surveys are usually sent 3 – 5 days after the conference, so participants have some time to reflect on their experiences.

Pros: Respondents complete the survey on their own time, at their own pace. The data process is simplified —data can be easily downloaded for analysis. Reminders can be sent to non-responders. Web-based surveys typically cost less than traditional paper surveys.[2]

Cons: The process is hampered by collecting incomplete or wrong email addresses. Respondents may not have access to email or a computer. Participants have different levels of computer expertise that could result in non-completion.

8. Communicating the Evaluation to Presenters and Participants

Communicating the evaluation process to presenters and workshop and conference attendees is important in gaining support for the evaluation process. Introduce presenters to the evaluation process via a letter that details their role in the evaluation. (See Appendix A: Sample Presenter Letter). Also, share the evaluation with the presenters so that they are aware of how the audience will be evaluating the workshops.

Workshop and conference participants should be informed of the importance of completing the evaluations both verbally and through written materials, such as an ad in the program materials (See Appendix B: Sample Evaluation Ad).

9. Working with Data

After successfully designing, implementing and collecting the surveys, the data analysis begins. It is important to process the data so that it can be summarized for the stakeholders. Building an electronic database is the first step to process the data.

Building a Database

Whether a paper or web-based survey was used, using an electronic database to analyze the data is simple, effective method to examine the data. Excel spreadsheets can be created for easy data entry. Access can

[2] Don A. Dillman, 2000. *Mail and Internet Surveys: The Tailored Design Methods.* Second edition. New York: Wiley.

also be used to enter data. However, SPSS is one of the more commonly used databases in social science research. The OSTRC uses SPSS and Excel for its analysis.

Analyzing Data

After entering all of the data into the database, the analysis begins. There are an infinite number of ways to analyze the data. For workshop and conference evaluations, descriptive statistics are most commonly used. Descriptive statistics explain basic features about the data. For example, the mean score of the measures and the percent (how often participants responded) illustrate the basic findings from the survey. More advanced analysis may also be conducted with the data. For example, crosstabs are a useful analytic tool to determine if there are differences or similarities in responses based on specific characteristics (e.g., first time conference attendees, education levels, and geographic locations).

Summarizing and Presenting Data

There are a variety of methods with which to summarize and present data.

- In general, the data presentations should be user-friendly. Use an Executive Summary, Fact Sheet or PowerPoint presentation to highlight key findings from the data.
- Organize the findings in a practical way. Categorize questions together (e.g., background, programming, demographics).
- Graphically display results using charts or tables.
- Include recommendations based on findings.

Implementing Recommendations

Reports left in a pile will not be helpful to workshop and conference planners. To ensure that the data are reviewed, present the findings to the stakeholders. Include methods for implementing any recommendations presented in the report. In addition, provide a summary report and recommendation to the conference and workshop planners so that they can incorporate feedback into planning future workshops and conferences.

10. OSTRC Resources

In addition to this Toolkit, the OSTRC has created the following resources to design, implement and evaluate OST workshops and conferences. Contact Lisa Colby at lcolby@sp2.upenn.edu to request any of these resources.

Glossary of Terms

This fact sheet provides an overview of commonly used terms in out-of-school time research, evaluation and professional development.

Annotated Bibliography on OST Professional Development

The OSTRC conducted literature searches of the University of Pennsylvania library databases including PsycInfo, ERIC and Professional Development Collection for articles pertaining to promising practices in and evaluating professional development. Download this document from http://repository.upenn.edu/spp_papers/98.

Promising practices in OST Professional Development

This OSTRC document is based on four years of research and be downloaded from http://repository.upenn.edu/spp_papers/97.

SPSS PowerPoint

This PowerPoint provides an introduction to working with SPSS. Areas covered include creating a dataset, coding data, importing data and analyzing data.

OSTRC Surveys

The OSTRC created surveys to simplify the workshop and conference evaluation process. Contact Lisa Colby at lcolby@sp2.upenn.edu to discuss or request these tools. The following surveys are available to use "as is" or may be customized/modified:

- Workshop
- Overall Conference
- Peer Networking Meetings
- Presenter Self-Assessment

Appendix A: Sample Presenter Letter

Dear Workshop Presenter:

The Out-of-School Time Resource Center at the University of Pennsylvania is evaluating the year's **[insert name]** Conference. The OSTRC promotes out-of-school time (OST) student achievement by enhancing staff support and professional development. Through its work, the OSTRC created surveys to evaluate the impact of OST conferences and workshops. *As a presenter, we need your help to facilitate the evaluation process.* Workshop participants and presenters who complete these surveys will help to inform and enhance future [insert name] conferences.

The evaluation process includes:

- ☐ **Allowing 5 minutes at the conclusion of your workshop for participants to complete the workshop survey.**
- ☐ **Collecting completed Workshop Surveys from participants.**
- ☐ **Completing the Presenter Self-Assessment Survey.**
- ☐ **Returning completed workshop and presenter surveys to [insert specifics for returning completed surveys].**

Please contact the OSTRC at the contact information above with any questions or comments about the evaluation.

Thank you for your cooperation and assistance in facilitating the evaluation process!

Appendix B: Sample Evaluation Ad

"An investment in knowledge always pays the best interest."

--Benjamin Franklin

Tell us your thoughts about [insert conference title]!

- After each workshop session, a short survey will be distributed.
- Immediately following the conference, we will email you a link to an online overall conference survey.

Please complete the surveys.

Your responses are important and will help shape future [insert name] conferences!