

A GUIDELINE FOR EVALUATION OF EDUCATIONAL PROJECTS*

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I. Introduction

The development of a mechanism for evaluation and feedback is most essential in the initial stage of institution building. It seems a crucial aspect of the whole process of program formulation and implementation as well as of monitoring of the work performance. The evaluation has been difficult in the education-research institutions because of its characteristics. Though limited and experimental at this stage, this guideline is formulated to provide a specific conceptual and operational framework for evaluating projects and activities of the East-West Technology and Development Institute in relation to its institutional goals and values.

II. Institutional Goals and Values of TDI

In order to promote and stimulate economic and social development in Asian and the Pacific countries as well as in the United States, TDI has set the following objectives, though mutually interlocking, as major goals to be pursued:

1. To diffuse with *development entrepreneurship* in both public and private sectors,
2. To stimulate *technology adaptation* in the process of social change,
3. To encourage interchange of ideas and techniques and foster the development of *integrated planning*, and thus
4. To gear existing or new organization into the process of *institution building*.

III. Projects and Activities of TDI

TDI has three broad program categories: (a) "senior fellows" program for research,

*This paper was prepared to suggest a conceptual guideline for construction of evaluation schema of educational programs of East-West Technology and Development Institute at Honolulu, Hawaii.

(b) "degree students" program for education, and (c) "professional short-term training" program. "Conference and seminars" will be used as primary instruments for conceptualization and crystalizing the program focus of the Institute. The integrated and coordinated operation of programs depends heavily on the dynamics of administration and leadership of the Institute.

If we define the set of actions which is significant to the realization of TDI goals as a project, each program category has its own individual projects as shown in Table 1.

Table 1. Project Identification By Goals And Instruments

Instrumental Programs	Institutional Goals			Institution Building
	Development Entrepreneurship	Technology Adaptation	Integrated Planning	
Senior Fellows	individual fellows	individual fellows	individual fellows	
Degree Students	individual students	individual students	individual students	
Professional Training	separate project	separate project	separate project	
Conferences and Seminars				
ORGANIZATION AND ADMINISTRATION (supportive system)				

IV. Some Considerations for Development of Evaluation Schema

In order to develop a most suitable schema of project evaluation, it seems desirable to consider the following questions:

1. *Why* do we evaluate projects performed? (purpose of evaluation)
2. *Who* should do the evaluation? (matter of external or internal, independent or self evaluation)
3. *What* should be evaluated? (aspects and objects to be evaluated)
4. *When* are they supposed to be evaluated? (temporal perspectives of project effects and benefits), and
5. *How* can we measure and evaluate them? (techniques and methods of evaluation).

It is assumed in this guideline that the purpose and aims of evaluation of TDI projects is to: (a) afford TDI's program adapt to changing needs in Asia, the Pacific and U.S., (b) enhance the efficiency and effectiveness of program operation, and (c) provide "proof" of

the legitimacy of TDI activities in order to justify continued support. The guideline is developed on the basis of another assumption that responsibility for evaluation would be charged in TDI itself. In other words, the scheme is designed for an internal evaluation and feedback in the process of program operation rather than for an "external auditing" type of evaluation. Therefore, the problems of what, when, and how will be considered together for the designation of the schema.

What aspects of a project should be evaluated would depend on characteristics of project goals as well as the purpose of evaluation. A most significant approach to project evaluation may be to assess the extent to which the goals or objectives of project have been attained. However, we can hardly get such a single indicator or precise set of indicators. Therefore, in this schema, the items to be considered for evaluation cover not only objectives of the project but also the administrative process and organization for project operation. The schema identify long-term, intermediate, and immediate objectives; indirect objectives; unanticipated effects or benefits; project design; selection of senior fellows, students, and participants; methodology and techniques used; resources (time, fund, manpower, etc.); organizational arrangement; communication network; costs occurred, unexpected costs; etc.

When they are supposed to be evaluated depends on the items to be assessed that have been discussed above. It also depends on the temporal span of goals and effects of a project. The methods and techniques of evaluation would be determined by *what* and *when*. There would be various techniques such as qualitative vs. quantitative, rigorous measurement, observation, sample survey, behavioral research, reporting, judgment, etc. Because of the variety of interests and items included in it, however, this schema will be formulated only in the simple form of "checklist" at this stage.

What, when, and how of evaluation will be taken into account together in the checklist for evaluation of projects by grouping into three different program categories.

V. Evaluation of Senior Fellows Program

1. The main objective of the Senior Fellows program is to facilitate individual and/or collaborative research on a certain subject matter which appears significant to the attainment or realization of TDI goals.
2. Unit of project is an individual scholar.

3. Specific roles of the scholar expected by TDI are: (a) to conduct research in his own field as described in his research proposal; (b) to exercise influence, directly or indirectly, on TM, MA and PhD education programs in terms of curricula and/or methodology through his deliberate research which will eventually contribute to attainment of values being pursued by TDI; (c) to assist the TDI non-degree training program, to whatever extent is possible through his own research and by participation in training activities as an instructor and/or by contribution to the revision or designation of training programs.

4. Checklist for Evaluation of Senior Fellows Program (see Form- I)

FORM-I CHECKLIST FOR EVALUATION OF TDI SENIOR SCHOLAR PROJECT

What Aspect	Checklist	When	How
Tangible, immediate objective	1. What are the products of Senior Fellow's research undertaken with TDI support? (list the research outcomes: title, number of pages, publicity, etc.)	immediately after contract expired	written final report from
Intermediate objective	2. Whether or not was his research published or contracted to be published within one year after contract expired?	during the 1st year after contract expired	report from fellow and/or other source
Ultimate objective	3. Whether or not has his research been utilized by educational institutions for improvement in curriculum and methodology or content within 5 years after contract expired?	follow up for 5 years after contract expired	fellow's report & academic information
Institutional linkages of EWC	3.1 Is it being utilized for change in the education system of the University of Hawaii or other institutes? 3.2 Is It being used as resource material for educational or research purpose by UH or other? 3.3 Is it being used for technical innovation in the practitioners' world?		
Intra-TDI	4. To what extent has the senior fellow been engaged in training program? 4.1 participated in design & revision of training project? 4.2 participated in training project as an instructor? 4.3 To what extent has his research been used as text or resource material for a training project?	follow up during period of contract	observation
Intra-TDI impact	5. How many students of TDI were arranged to be advised by this senior fellow for their research or study?	follow up during the period of contract	fellow's report
Indirect, unexpeted benefit	6. Did his research bring any unanticipated effect conducive to TDI values within 5 years after the contract expired?	5 years after the contract end	by getting a report from fellow or from other source
Cost	7. What was the total cost for this project?	immediately after project	administrative report

Cost-benefit evaluation	7.1 Evaluate the benefit of item 1 in terms of the total cost. 7.2 Evaluate the benefit of item 2 in terms of the total cost. 7.3 Evaluate the benefit of item 3 in terms of the total cost. 7.4 Evaluate the overall benefits and effects in terms of the total cost.	judgmental evaluation
Summary	8. What should be recommended for reinforcement or improvement in the future?	judgmental evaluation

VI. Evaluation of Degree-Students Program

1. The objective of the TDI degree-student program is to make students involve in study and research in one of the four major TDI emphasis while they are working for their degree programs. The objective would be further extended, in the longer run, to make students continuously commit to education or practice along the line with the four TDI emphasis after their degree works.

2. Unit of project is an individual student enrolled in a MA or PhD program in the university.

3. Specific roles of a student expected by TDI are: (a) persuance of an academic degree as one single tangible fruit; (b) acquisition of sufficient knowledge and techniques relevant to development of his/her own communities which are assumed to be functional to TDI institutional objectives; (c) reorientation and motivation to change and innovation which stimulate development action in his/her own home base; and (d) participation in courses and seminars relevant to four main TDI objectives and formal or informal contact with the University professors and senior fellows, which in turn stimulate them to be more interested in the TDI emphasis.

4. Checklist for Evaluation of Student (see Form- II).

FORM-II CHECKLIST FOR EVALUATION OF TDI STUDENTS

What Aspects	Checklist	When	How
Immediate, instrumental aspect of objective	1. When did he get degree? _____ In what field? _____ What is the title of thesis? _____	immediately after the contract finished	getting a report from both student and advisor
Intermediate objective	2. How relevant is this thesis to TDI point of view? and to what extent does it seem to contribute to development of his own community?	" "	judgement

Intermediate objective and client needs	3. What specific techniques and professional knowledge has been obtained by the student which eventually can contribute to development and change in his own community?	" "	judgement
Intermediate	4. Was his/her motivation, orientation and attitude appropriate to the task of carrying out innovation?	" "	judgement
Immediate built-in assessment	5. How was academic performance, scores, records etc.	" "	by getting a report
Ultimate objectives	6. To what extent has the student made a commitment to the four major TDI objectives through academic work or activities in practical world?	five years after the contract expired	by getting a report the student & some others
Process assessment	7. To what extent is the student interested in TDI activities? How many TDI-relevant courses did he take and how often did he contact with senior fellows?	throughout the contract period.	observation & report from senior fellows
Unexpected effects or specials	8. Special notes on the student (award, any other)	follow up	through correspondence or other source
Cost	9. What was the total cost for this student?	immediately after the contract expired	through administrative procedure
Cost-Benefit evaluation	9.1 To what extent was the cost worth while for specific knowledges and techniques obtained by the student (see item 3)?	" "	judgement
	9.2 To what extent was it worthwhile for the degree and his research? (see item 1 & 2)	" "	judgement
	9.3 To what extent was it worthwhile for the student in the long-run? (see item 6)	5 years after the contract expired	judgement

VII. Evaluation of Professional Training Program

1. The objective of professional training program is to train professionals and practitioners in private and government sectors of the Asian and Pacific countries in the specific knowledges and techniques which seem relevant to meeting the developmental needs of their own countries and to reorient them toward modern values and attitudes conducive to their development actions.

2. Unit of project is a short-term professional training project.

3. Specific tasks involved in each training project are: (a) to train participants for the objectives as described in the prospectus of the respective training project; (b) to promote and stimulate the exchange of views and ideas among participants through seminars, workshops, group discussion, etc.; (c) to advocate the research outcomes of senior fellows to

the practitioners who participate in the training program for their application of new techniques and ideas and also to provide a foundation to cooperate with the TDI students in the future by having a perceptual tie; and (d) to utilize the training program as an opportunity to test the applicability, practicality of research findings of senior fellows and to evaluate the relevancy of research to the institutional goals of TDI.

4. Checklist for Evaluation of Training Project (See Form-III)

FORM-III CHECKLIST FOR EVALUATION OF TRAINING PROJECT

What Aspect	Checklist	When	How
Ultimate objective	1. To what extent are the participants agents of change in the adoption of new ideas and techniques in their own-countries?	Follow up for 5 yrs. after the project	getting a report & other source
Immediate objective and client needs	2. What specific new ideas & techniques have they introduced in their organization upon return from the training session?	1 year. after the project	getting a report & other source
Immediate instrument evaluation	3. To what extent has the training provided techniques & knowledge to help the participants cope with their organizational or community problems?	follow up during the training	observation & judgment
Personality	4. To what extent are they motivated to bring about change for the development of their own organization and society?	" "	" "
Intra-TDI coordination	5. To what extent has their training project utilized EWC & UH resources such as faculty, senior fellow and graduate students for program design, content and methods of training, and resource material for training?	" "	" "
Future impact to research	6. To what extent has the training project stimulated the applied research of TDI senior fellows and University faculty?	" " additionally follow up for 3-4 yrs.	" " also getting a report from scholar
Program design	7. Was the program design appropriate and specific in terms of content and methods? (evaluate in terms of selection of resource persons, guidelines to instructors for lecture preparation, appropriate content, selection of participant, etc.)	review items 1 to 4	judgment
Material resource	8. Were the resource materials adequately prepared? (reading materials duplicated, outline of lectures prepared, workshop format or guideline suggested, etc.)	follow up and assess items 1 to 4	observation & report, & opinion of participants
Method evaluation	9. Was there an appropriate mixture of training methods? (lecture, discussion, small group, workshop, field survey, individual guidance, etc.)	immediately after the training, assess items 2 & 3	judgment
Cost	10. What was the total cost for this training project?	immediately after project	judgmental evaluation
	10.1 Evaluate the benefit of item 1 in terms of total cost.	"	"

	10.2 Evaluate the benefit of item 2 in terms of total cost.	"	"
	10.3 Evaluate the benefit of item 3 in terms of total cost.	"	"
Summary	11.1 Why was the program a success or a failure?	immediately after project	judgmental
	11.2 What should be reinforced or improved in the future?	"	"

VIII. For Other Categories

Conferences and seminars would be held for the purpose of integration of TDI programs toward its institutional goals. Therefore, they also can be evaluated in terms of their "guidance role" in the elaboration and designation of TDI programs and projects.

Administration and organization of TDI as a supportive system to the TDI programs and projects in all ranges can be evaluated by assessing process, procedures, technology, logistics, communication, etc.